

## SELF-ASSESSMENT

# The \$1M+ Readiness Checklist

If you check 80% of these boxes, you're ready to scale past \$1M+.

### LEADERSHIP & TEAM

- ☐ You have 1–4 coaches OR plan to add more
- ☐ You're doing too much yourself (Stage 3 bottom line: "Get help")
- ☐ Your team needs better systems, not more hours

### OPERATIONS

- ☐ You use 3+ tools to run the business
- ☐ Notes or data live in multiple places
- ☐ Handover between coaches is painful
- ☐ Client experience is inconsistent

### CLIENT DELIVERY

- ☐ Coaching quality depends on the individual coach
- ☐ No standardized onboarding
- ☐ Too much manual prep per session
- ☐ No visibility across coaching outcomes

## SALES & MARKETING

- ☐ No single place to track client engagement
- ☐ Inconsistent lead follow-up
- ☐ Limited reporting

## SYSTEMS

- ☐ No branded portal
- ☐ No centralized multi-coach dashboard
- ☐ No analytics or performance data
- ☐ No stakeholder / HR Dashboard

### Score Your Results

12+ boxes checked: You're in the ideal stage to systemize and scale

8–11 boxes checked: You're experiencing growth pain—time to build systems

Under 8 boxes checked: Focus on stabilizing operations before scaling