



Systems Snapshot Scorecard

Your Behind the Scenes Reality Check start here!

7 minutes.

Go with your first honest answer!

How to rate:

1 - Not set up / chaotic

4 - Solid and mostly smooth

2 - Exists but messy

5 - Clear and easy

3 - Works, but clunky

Section 1 - Attract + Convert	1	2	3	4	5
Offer Clarity – I can explain what I do, who it's for, and the outcome in one breath.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lead Capture – People can easily join my list / book / inquire (and it works).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nurture & Follow-Up – New leads get consistent emails or follow-up without me scrambling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales & Checkout – Payment + booking + next steps are clear and reliable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Client Onboarding – Welcome email, expectations, intake, links, and access are smooth.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Add your page 1 subtotal, then continue to Section 2.

Page 1 subtotal: _____ / 25



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Section 2 - Deliver + Run the Business	1	2	3	4	5
Delivery System — How I deliver (calls/files/portal/process) is organized and repeatable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Files & Assets — Docs, templates, content, and client assets are easy to find (quickly).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tools & Integrations — My tools play nicely together (or at least aren't fighting daily).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finance Basics — Invoicing, tracking income/expenses, and knowing numbers is manageable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visibility & Metrics — I can see what's working (leads, conversions, revenue) without guessing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 2 subtotal: _____ / 25

Total score (page 1 and 2): _____ / 50

The most annoying system right now is: _____

If I could fix ONE thing in 30 days, it would be: _____

What Your Score Means

Total possible score: 50

10 - 20: Triage Mode

You're carrying invisible tech weight. Your systems aren't failing because YOU'RE failing - they're just not built yet (or they're built out of order.)

21 - 34: Stabilize Mode

You have pieces, but they are not connected. This is where "I'm doing all the things" meets "why isn't this working?"

35 - 44: Streamline Mode

Your foundation exists. Now it's about cleaning up clunky steps, simplifying tools, and removing friction.

45 - 50: Scale-Ready Mode

You're in optimization territory: better automation, better reporting, better delegation.

Pattern clues:

- High leads + low sales → messaging/offer fit or follow-up gaps
- High sales + low onboarding/delivery → churn/burnout risk
- Low tools/integrations + high manual work → time leaks (aka "why am I always behind?")

////////////////////////////////////
Circle your lowest 2 scores. Those are your "stuck spots."
////////////////////////////////////

Want us to translate your scores into a clear fix-first plan?

The Systems Foundation Audit + 30-Day Action Plan pinpoints what's causing the drag, what to ignore for now, and what to tackle first so you stop guessing and start executing with relief. [For more information click here!](#)