

THE BUSINESS STRESS TEST CHECKLIST

A quick-hit checklist to help you identify the areas of your business that are most vulnerable to owner-dependence.



1. LEADS & SALES

- ☐ Is there an automated way for leads to contact you and get a fast reply?
- ☐ Is your sales process documented?
- ☐ Can someone else quote or close a deal without you?



2 TEAM COMMUNICATION

- ☐ Do your team members know who to go to (other than you) for decisions?
- ☐ Are roles and responsibilities clearly defined and written down?
- ☐ Is there a central place for task tracking?



3. OPERATIONS AND FULFILLMENT

- ☐ Are your core processes (from client onboarding to job closeout) documented and repeatable?
- ☐ Can someone else follow the steps and get the same result?
- ☐ Are tools and logins centrally managed (not just in your head)?



4. FINANCIAL OVERSIGHT

- ☐ Do you get weekly/monthly financial reports automatically?
- ☐ Are payments, invoices, and billing standardized and visible?
- ☐ Can someone else access what they need in a secure, trackable way?



5. OWNER BOTTLENECKS

- ☐ What decisions can only be made by you?
- ☐ What tasks can't move forward without your input?
- ☐ Are you still the only "glue" holding everything together?



CONCLUSION

If you checked more than 5 boxes... you've built a business that depends on you.

Let's fix that. Schedule a quick strategy call and find out what's possible when your business runs like a machine — without breaking you in the process.

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