

Foundari Growth Systems Blueprint



Are your systems helping you scale — or silently slowing you down?

Introduction

Your tools aren't just tools. They're your strategy in motion. This self-assessment helps you map your current systems, spot bottlenecks, and identify the smartest upgrades to support growth.

How to Use This Assessment

Score each area from **1 (missing or inefficient)** to **5 (optimized and strategic)**.

Then total your score to find your Systems Tier and next step.

1. CRM & Data

Is your customer data centralized, segmented, and actually used to drive decisions?

- One source of truth?
- Clear segmentation by lifecycle / service / value?
- Data is actionable (not just stored)?

Score (1–5): _____

2. Marketing Ops

Do campaigns run on systems — with automation, attribution, and clear performance metrics?

- Campaigns are repeatable, not reinvented
- Tracking is consistent (source → conversion)
- Performance reporting is visible and trusted

Score (1–5): _____

3. Sales Workflow

Are handoffs smooth and trackable — and are forecasts reliable?

- Stages are defined and used consistently
- Follow-up is structured, not dependent on memory
- Leadership can see pipeline health without a meeting

Score (1–5): _____

4. Delivery Ops

Are projects and services delivered through streamlined workflows with clear accountability?

- Delivery is templated and repeatable
- Owners and deadlines are clear
- Client communication is consistent

Score (1–5): _____

5. Finance & Admin

Are approvals, invoicing, and recurring tasks automated and reliable?

- Invoicing + payments are consistent
- Approvals don't bottleneck everything
- Recurring admin work is systematized

Score (1–5): _____

6. Team Collaboration

Does your team use consistent tools for communication, tasks, and knowledge sharing?

- Work isn't trapped in DMs and inboxes
- Tasks live where the team can see them
- Knowledge isn't locked in people's heads

Score (1–5): _____

7. Dashboards & Reporting

Can you access real-time, integrated data with role-based insights?

- KPI visibility is fast and trusted
- Reporting doesn't require manual "data hunts"
- Each role sees what matters

Score (1–5): _____

4. Strategic Alignment

Are your systems actively supporting strategic goals and KPIs?

- Tools support priorities (not distractions)
- Work maps to outcomes
- Improvements are intentional, not reactive

Score (1–5): _____

Total Score: _____ / 40

Your Systems Tier



0–15: Patchwork Ops

Your systems are fragmented. Work depends on people remembering steps — and growth adds stress.

Key Signs:

- Data lives in multiple places
- Handoffs break or get repeated
- Reporting requires manual digging
- Process changes depending on who's doing it

Pro Tips:

- Choose one “source of truth” (customer + work status)
- Standardize your handoffs before adding new tools
- Fix one repeatable workflow first (lead → follow-up, onboarding, invoicing)

Next Step:

- **Download:** [Growth System Prompt Framework \(Patchwork Ops\)](#)

16–25: Foundation Laid

You have good pieces, but they don't fully connect yet. You're close to real leverage.

Key Signs:

- Some automation exists, but it's inconsistent
- Teams use different tools or definitions
- Visibility varies by department
- Bottlenecks show up during busy periods

Pro Tips:

- Align your lifecycle stages across marketing → sales → delivery
- Remove overlap (two tools doing one job)
- Build a simple dashboard leaders can trust

Next Step:

- **Download:** [Growth System Prompt Framework \(Foundation Laid\)](#)

26–40: Strategic System

Your foundation is strong. Now it's about optimization, visibility, and compounding gains.

Key Signs:

- Processes are repeatable and owned
- Data is mostly centralized and trusted
- Leadership has visibility without chasing updates
- Improvements are proactive, not reactive

Pro Tips:

- Map your full growth loop (attract → convert → deliver → retain)
- Add reporting + alerts so issues surface early
- Optimize ROI by automating high-frequency friction points

Next Step:

- **Download:** [Growth System Prompt Framework \(Strategic Systems\)](#)

About Foundari

We help growth-minded businesses scale faster through clear brands, smart marketing, and seamless systems.

Whether you're just starting or scaling a thriving business, we meet you where you are.

foundari.com

Book a quick Growth Systems Review

We'll review your score, pinpoint what's creating drag, and map a clear next step.