



## SCALE™ Freedom Assessment

### Is Your Business Built to Last — or Built on You?

Answer each question honestly. Score yourself **1 (not at all true) to 5 (very true)**.

At the end, total your score to see where your firm stands.

#### Strategy

- \_\_\_\_\_ My business has a clearly documented vision, mission, and growth plan.
- \_\_\_\_\_ We regularly review goals and adjust based on performance data.
- \_\_\_\_\_ Our leadership team is aligned and knows the priorities.

#### Clients

- \_\_\_\_\_ We attract clients consistently without relying only on referrals or my personal network.
- \_\_\_\_\_ We have a clearly defined ideal client and a process to filter out poor fits.
- \_\_\_\_\_ Our client experience is systematized and repeatable.

#### Automation / Systems

- \_\_\_\_\_ Our business operations are documented so tasks don't depend solely on me.
- \_\_\_\_\_ We leverage automation or technology to streamline key functions.
- \_\_\_\_\_ If I stepped away for 30 days, the business could still run smoothly.

#### Leadership / People

- \_\_\_\_\_ I have empowered team members who can make decisions without me.
- \_\_\_\_\_ Roles and responsibilities are clearly defined across the company.
- \_\_\_\_\_ I spend more time mentoring and leading than "doing the work" myself.

#### Expansion / Legacy

- \_\_\_\_\_ The business generates consistent, predictable profitability.
- \_\_\_\_\_ We have multiple revenue streams or growth pathways.
- \_\_\_\_\_ I'm building a company that could be sold, scaled, or passed on if I chose.

## SCORING

**60–75:** Congratulations! Your business is well on its way to thriving without you.

**40–59:** Solid foundation, but gaps remain that keep you tied down.

**15–39:** Warning: Your business depends heavily on you. It's time to start building systems for freedom.

## YOUR NEXT STEP:

Your score reveals where your business is today. The next step is transforming those gaps into growth.

Schedule a free Strategy Call with Tracy LeRoux to discover how to apply the SCALE Freedom Framework® to your business.

