

Scaling Roadmap Worksheet

Task audit → five choices → your 30-60-90 action plan.

Strategic Steps Consulting, LLC



Step 1 — Task Audit: Where Does Your Week Actually Go?

List your recurring tasks (start with the ones that most often wait on you). Then mark the decision: **Hire** · **Automate** · **Delegate** · **Outsource** · **Eliminate** · **Keep** (truly needs you).

Recurring task	Hrs/wk	Needs me? Why?	H / A / D / O / E / K

Step 2 — The Decision Guide

Choose...	When...
Hire	The work is ongoing, core to the business, and needs dedicated capacity that grows with you.
Automate	The task is repetitive and rule-based: invoicing, reminders, scheduling, standard reports.
Delegate	Someone already on the team can own it today with clear, written instructions.
Outsource	It's specialized and must be done well, but not in-house: bookkeeping, IT, payroll, legal.
Eliminate	Honestly, nobody would miss it. Growth is also about what you stop doing.

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Step 3 — My First SOP

Process I'll document first (the one that waits on me most):

Who will run it from the document once it's written:

Date I'll have it drafted:

Step 4 — My 30-60-90 Roadmap

Phase	Focus	My three commitments	Done by
Days 1–30 STABILIZE	Fix the riskiest legal gap; separate finances; schedule the monthly money review.	1. 2. 3.	
Days 31–60 SYSTEMATIZE	Write the first SOP; act on the task audit; tighten invoicing and follow-up.	1. 2. 3.	
Days 61–90 STRENGTHEN	One owner per outcome; weekly team rhythm; review margins and pricing.	1. 2. 3.	

Accountability: Share this roadmap with one person who will ask you about it — a business partner, mentor, peer, or coach. Put a 30-day check-in on both calendars now.

Questions? Let's talk about where you're stuck — no pressure, no jargon.

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