

THE SOLOPRENEUR'S SCALING CHECKLIST

YOUR GUIDE FROM \$500K TO \$1M

1

HOW TO USE THIS GUIDE

Mark Off Tasks: Use this document to check off tasks as you complete them, keeping track of your progress.
Come Back Often: Your business changes over time, so revisit this checklist to update your progress and tackle new challenges.
Think About Each Step: Take your time with each task, thinking about how it helps your business grow.



SYSTEMIZATION AND AUTOMATION

Making things run smoothly on their own frees up your time for big-picture thinking.

- ☐ Document your recurring tasks.
- ☐ Find tools that can do simple tasks for you.
- ☐ Delegate tasks to team members.
- ☐ Set up a software system so your business can run when you're not there.



TEAM BUILDING AND DELEGATION

Building a strong team means you don't have to do everything yourself.

- ☐ Decide which tasks you can give to others.
- ☐ Hire people who share your business vision.
- ☐ Teach your team how to do their tasks well.



CLIENT ACQUISITION AND RETENTION

Getting new customers and keeping them is how your business grows.

- ☐ Add new acquisition platform to get customers.
- ☐ Make sure your customers are happy and want to stay.
- ☐ Create a plan to have existing customers refer you business.



PERSONAL DEVELOPMENT AND LEADERSHIP

Growing your business means growing as a leader too.

- ☐ Spend time learning new business skills.
- ☐ Find a mentor or coach who can guide you.
- ☐ Take breaks to avoid burnout and come back refreshed.



QUALITY CONTROL

Keep your products or services top-notch as you grow.

- ☐ Set standards for what you offer.
- ☐ Check your products/services regularly to make sure they meet these standards.
- ☐ Delegate team members to do random checks on each other to hold each other accountable.
- ☐ Ask for feedback from customers to see where you can improve.



FINANCIAL MANAGEMENT

Handling your money wisely is key to growing your business.

- ☐ Plan out your budget for growth.
- ☐ Create a dashboard to keep track of money coming in and going out.
- ☐ Install 'Profit First' to maintain profitability.



MARKET ADAPTATION

Staying relevant means keeping up with what customers want and what competitors are doing.

- ☐ Create system for monitoring new trends in your market.
- ☐ Keep an eye on what competitors are doing right (or wrong).

This checklist is designed to be a practical tool for growth, offering clear actions to help you scale your business effectively. Work through each section thoughtfully, applying what makes sense for your unique situation, and watch as your business climbs to new heights.

If you need a hand installing these systems or just want to chat about strategies for scaling your business effectively, we're here to help.

Reach out to us at square1grp.com/contact