



# T H E C E O S Y S T E M S A U D I T

Find the Hidden Bottlenecks  
Costing You 10+ Hours a Week

**Audit. Fix. Free.**

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## The Problem

You're the system. Everything runs through you. If you disappeared for 2 weeks, everything would fall apart. Not because your team is bad — but because NOTHING IS DOCUMENTED.

## How to Use This Audit

Rate each area 1-5:

- 1 = Chaos (all in my head)
- 2 = Mostly in my head
- 3 = Partially documented
- 4 = Mostly documented and delegated
- 5 = Running without me

**Focus on areas scoring 1-2 first.**

### **AREA 1: CLIENT MANAGEMENT — RATE EACH (1-5)**

Lead capture: \_\_\_\_\_

Client onboarding: \_\_\_\_\_

Ongoing communication: \_\_\_\_\_

Client offboarding: \_\_\_\_\_

### **AREA 2: OPERATIONS — RATE EACH (1-5)**

Project management: \_\_\_\_\_

Team communication: \_\_\_\_\_

File organization: \_\_\_\_\_

Meeting structure: \_\_\_\_\_

**AREA 3: FINANCES — RATE EACH (1-5)**

Invoicing: \_\_\_\_\_

Expense tracking: \_\_\_\_\_

Financial reporting: \_\_\_\_\_

Tax prep: \_\_\_\_\_

**AREA 4: MARKETING & SALES — RATE EACH (1-5)**

Content creation: \_\_\_\_\_

Social media: \_\_\_\_\_

Email marketing: \_\_\_\_\_

Sales process: \_\_\_\_\_

**YOUR RESULTS**

**NEXT STEPS**

My biggest bottleneck is:

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The first system I'll document:

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By when:

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## Your Next Steps

### TAKE THE DIAGNOSTIC

5 minutes to discover your primary zone and get personalized insights. Free.

[TAKE THE FREE DIAGNOSTIC →](#)

### BOOK A STRATEGY SESSION

90 minutes to get crystal clear on your zone, your roadmap, and your next 90 days.

[BOOK YOUR SESSION →](#)



### Hi, I'm Lauren!

Three years ago, my daughter asked her dad 'why is mom always working?' — and I was standing right there. That moment changed everything. Today I close my laptop at 4 PM every day, never miss Friday pickleball with my daughter, and help other CEO parents do the same. You can have profit AND presence. I'm proof.

[profitandpresence.com](https://profitandpresence.com)

[@scalewithlauren](https://www.instagram.com/scalewithlauren)

[YouTube: @ProfitandPresenceCo](https://www.youtube.com/@ProfitandPresenceCo)

*You can't skip zones. But you CAN move through them faster with the right support.*