Course: Solopreneur to CEO: The Playbook for Sustainable 7-Figure Scaling

Lesson 11: The CEO Scorecard & Business Dashboard

1. Core Concept & Learning Objective

Core Concept (149 words): You are now a "Leader" (L1), not a "Doer." This lesson gives you the "Leader's" tool. The "Mission Control" dashboard (from Course 6) was "tactical"—it tracked "funnel" health. The "CEO Scorecard" is "strategic"—it tracks *business* health. This is your 5-metric, "10,000-foot-view" dashboard. It's designed to be reviewed 1x/week and answer *only* "big picture" questions: 1. Are we *growing*? (Leads/Revenue). 2. Are we *profitable*? (Profit Margin). 3. Are our *customers* "happy"? (e.g., LTV). This is how you manage the *health* of the business, not the "tasks."

Learning Objective: By the end of this lesson, you will be able to **differentiate** between a "tactical" dashboard (C6) and a "strategic" dashboard (C7) and **design** a high-level, 5-metric "CEO Scorecard" to manage the *health* of the business, not the daily "tasks."

2. Interactive Content Activities

Activity 1: Case Study: "The 'In-the-Weeds' Dashboard vs. The 'CEO' Scorecard"

- **Type:** Case Study Analysis

- **Time:** 15 minutes

- **Instructions:**

  1. Read the two scenarios:

  2. **'Founder A' (The 'Doer' Dashboard):** Her "dashboard" has 50 metrics. It shows "Likes," "Email Open Rates," "Task #1 Status," "Task #2 Status," etc. She spends 1 hour *digging* through the "weeds" and "micromanaging" (L1) the "tasks."

3. **'Founder B' (The 'CEO' Scorecard):** Her "dashboard" has 5 *strategic* metrics: "1. New Leads (Growth)," "2. Total Revenue (Growth)," "3. Net Profit Margin (Profit)," "4. LTV (Customer Health)," "5. Team 'Health' (Red/Yellow/Green)." She reviews it in 5 minutes and *knows* the "health" of her *entire* business.

4. In the text box, answer: "Why is 'Founder A's' dashboard a 'Doer's' (L1) 'micromanagement' tool? Why is 'Founder B's' dashboard a 'Leader's' (L1) 'strategic' tool?"

- **Expected Outcome:** An "a-ha" moment about the *purpose* of a "CEO" dashboard: it's for "strategic" (health) review, *not* "tactical" (task) management.

Activity 2: Strategic Exercise: "My 5 'CEO Scorecard' Metrics"

- **Type:** Strategic Exercise

- **Time:** 20 minutes

- **Instructions:**

  1. Your "Scorecard" must be "high-level."

  2. Open the "CEO Scorecard" template.

  3. Your task: *Choose* your 5 "Strategic" metrics.

  4. *Example Scorecard:*

     - **1. "Growth (Marketing)":** "New Email Leads (Last 7 Days)." (Source: C6, L3)

     - **2. "Growth (Sales)":** "Total Revenue (Last 7 Days)." (Source: C6, L4)

     - **3. "Profitability":** "Net Profit Margin (%)." (Source: C6, L5)

     - **4. "Customer Health":** "Customer Lifetime Value (LTV)." (Source: C6, L4)

     - **5. "Team/Ops Health":** "# of 'Red Flags' (Critical tasks 'overdue')." (Source: C4, L11)

- **Expected Outcome:** Your *final* "CEO Scorecard"—the 5 metrics that *you* (as CEO) will review 1x/week.

Activity 3: Tool Exploration: "Building the 'Strategic' View"

- **Type:** Tool Exploration

- **Time:** 15 minutes

- **Instructions:**

  1. You *already* "built" this dashboard in "Course 6, Lesson 11" (The "Mission Control" Hub).

  2. Your task: Go *back* to your "Mission Control" Hub (C6, L11).

  3. "Review" it. Does it *only* show your 5 "Strategic" metrics (from Activity 2)?

  4. Or is it "cluttered" with "Doer" metrics (e.g., "Likes," "Followers," "Task Lists")?

  5. "Tidy" it. "Delete" (or *move*) all "tactical" (task-level) info *off* this "Hub."

- **Expected Outcome:** A "clean," "upgraded" "Mission Control" hub that is now a true "CEO Scorecard" (strategic), not a "Manager" dashboard (tactical).

Activity 4: "My 'CEO Scorecard' (v.Final)" (Peer Collaboration)

- **Type:** Peer Collaboration / Discussion

- **Time:** 10 minutes

- **Instructions:**

  1. Go to the community discussion board.

  2. **Post:** A *screenshot* of your *new, clean* "CEO Scorecard" (your 'C6, L11' hub, as 'upgraded' in Activity 3).

  3. **Post:** "This is my *final* 'CEO Scorecard.' It *only* shows my 5 'strategic' KPIs."

  4. Reply to one other student's "Scorecard" and "rate" its "simplicity" (1-5).

- **Expected Outcome:** A "finalized," "peer-approved" "CEO Scorecard" that is 100% "strategic."

3. Assignment & Project Milestone

Assignment: The "CEO Scorecard" & Business Dashboard (Component 11 of Final Project)

- **Estimated Time:** 60 minutes

- **Deliverable:** A "share" link to your "CEO Scorecard" (your "upgraded" C6, L11 "Mission Control" Hub).

- **Description:** This is the *final* evolution of your "Mission Control" hub. You will ensure it is 100% "strategic," showing *only* your 5 "CEO" metrics (from Activity 2) and the high-level "trend" charts.

- **Step-by-Step Instructions:**

  1. Open your "Mission Control" Google Sheet (from C6, L11).

  2. Go to the "HUB" tab.

  3. **"Action 1: The 'Metric' Audit."**

     - "Review" the 5-7 KPIs you are "pulling" (from C6, L11, Act 2).

     - "Ensure" they match your 5 "Strategic" KPIs (from *this* lesson, Activity 2).

  4. **"Action 2: The 'Clutter' Audit."**

     - "Delete" or "Move" any "tactical" info from this "HUB." (e.g., "Task lists," "project lists," "notes").

     - This "HUB" is *only* for your "5 Strategic KPIs" and your "3 Trend Charts" (Marketing, Sales, Profit).

  5. **"Action 3: The 'Title' Audit."**

     - "Rename" this tab from "Mission Control" to "**CEO SCORECARD (v.FINAL)**."

  6. Save and generate a "share" link. This is Component 11 of your Final Project.

- **Connection to Final Project:** This "Scorecard" is the *final tool* you need as "CEO." It's the "cockpit" of your 7-figure "plane." Your "Job Description" (L1) is *what* you do; this "Scorecard" is *what* you "read."

- **Evaluation Criteria:**

  - **Excellent:** The link opens a "dashboard" (not a "spreadsheet") that is "clean," "simple," and 100% "strategic" (it shows 5-7 "KPIs" and "Charts," *not* "task lists").

- **Proficient:** The link opens a "dashboard," but it is "cluttered" with "tactical" ("Doer") info (e.g., "to-do lists").

- **Needs Improvement:** The link is just a "spreadsheet" (one of the "data" tabs from C6), not the "HUB" (the "dashboard" tab).

4. End-of-Lesson Assessment

(Multiple Choice 1) What is the *difference* between a "Tactical" (C6) and "Strategic" (C7) dashboard?

- A. "Tactical" tracks "profit"; "Strategic" tracks "tasks."

- B. "Tactical" tracks "tasks" (e.g., "Task Status"); "Strategic" tracks "health" (e.g., "Net Profit Margin").

- C. They are the same thing.

- D. "Tactical" is for "CEOs"; "Strategic" is for "VAs." *(Answer: B)*

(Multiple Choice 2) In the "In-the-Weeds" vs. "CEO" case study, 'Founder A's' "dashboard" was a "failure" because:

- A. It was "too simple" (it only had 5 metrics).

- B. It was "too cluttered" with "tactical" (Doer) metrics, forcing her to "micromanage" tasks.

- C. It was "strategic" (tracking "health").

- D. It was in "Notion." *(Answer: B)*

(Multiple Choice 3) What is the "CEO Scorecard" (your assignment)?

- A. A *new* "dashboard" you must "build" from scratch.

- B. An "upgraded" (simplified, strategic) "version" of your "Mission Control" hub (from C6, L11).

- C. A "list" of your "tasks."

- D. Your "Team" dashboard. *(Answer: B)*

(Multiple Choice 4) A *true* "CEO Scorecard" (L11) should *not* contain:

- A. "Net Profit Margin (%)."

- B. "Total Revenue ($)."

- C. "A list of 'overdue' tasks from your 'VA'."

- D. "New Leads (#)." *(Answer: C. This is "tactical micromanagement," not "strategic health".)*

(Short Answer 1) What is *one* "Strategic" KPI on *your* "CEO Scorecard"?

- *(Example Answer: "Net Profit Margin (%).")*

(Short Answer 2) What is *one* "Tactical" metric you "deleted" (or *would* "delete") from your "CEO Scorecard" (from Activity 3)?

- *(Example Answer: "I 'deleted' my 'To-Do List' (from C4, L11). That's a 'Doer' metric. I will look at that on my 'Ops Hub' (C4, L11), not my 'CEO Scorecard'.")*

(Scenario-Based 1) You are in your "Weekly 'CEO' Review" (C6, L12). You look at your *new* "CEO Scorecard" (this lesson).

- **Data:** "Net Profit Margin" (KPI) is "Red" (down 50%).

- What is your "CEO" "action"?