Practice Scaling & Delegation Roadmap

Practitioner Name: __ *Date:* _____

Section 1: Capacity & Readiness Audit

Determine if you are ready to transition from "Solo-preneur" to "Functional Medicine Leader" based on the 60% capacity rule.

- [ ] **Current Workload:** I am spending more than 10 hours/week on administrative tasks (billing, scheduling, email).

- [ ] **Clinical Quality:** I feel rushed during patient "Target" phases because of "Organize" phase paperwork.

- [ ] **Revenue Plateau:** My income has stalled because I lack the time to onboard new clients.

- [ ] **Burnout Level:** On a scale of 1–10 (10 being total exhaustion), I am at a: _

Current Capacity Percentage: __% *(Goal: Hire your first VA when you reach 60% capacity to allow for training time.)*

Section 2: The $10 / $100 / $1,000 Task Matrix

List your daily tasks below. Delegate the $10 tasks immediately, move toward delegating $100 tasks, and protect your $1,000 Zone of Genius.

Task Value	Specific Tasks (e.g., Email triage, Lab prep, Strategy)	Delegate To:
$10 Tasks (Admin, Filing, Scheduling)		□ VA
$100 Tasks (Coaching, Lab Org, Content)		□ Coach/Nutritionist
$1,000 Tasks (Clinical Synthesis, Strategy)		**KEEP (Practitioner)**

Section 3: The R.O.O.T.S. Vetting Checklist

Use this during the interview process to evaluate "Functional Thinking" and cultural fit.

- [ ] **Reveal:** Does the candidate validate patient struggle beyond "normal" lab ranges?

- [ ] **Organize:** Can the candidate spot patterns in a mock intake form?

- [ ] **Optimize:** Does the candidate offer empathetic, practical solutions for lifestyle barriers?

- [ ] **Sustain:** Does the candidate show interest in long-term patient support vs. quick fixes?

- [ ] **Test Project:** Have I assigned a 2-hour paid project (e.g., drafting a protocol email)?

Section 4: SOP (Standard Operating Procedure) Audit

Identify which "Practice Bible" entries need to be created or updated before your new hire starts.

- [ ] **Admin SOP:** Onboarding, refund requests, and dispensary management.

- [ ] **Clinical SOP:** Lab review folder prep and "Red Flag" symptom protocols.

- [ ] **Communication SOP:** "Voice of the Practice" (e.g., Client vs. Patient terminology).

- [ ] **Video SOPs:** Have I recorded a "Loom" video for my most repetitive digital tasks?

Reflection & Leadership Goals:

What is the #1 task I will delegate this week to reclaim my "Zone of Genius"?

Team Communication Plan: (e.g., Monday 15-Minute Huddle, Slack for chatter)

AccrediPro Standards Institute Certified Tool Lesson 6: Building Your Care Team