

Practice Scaling & Infrastructure Audit

Practitioner Name: _____ Date: _____

Section 1: Capacity & "Ceiling" Analysis

Evaluate your current operational status to determine if you are ready for the transition from Practitioner to CEO.

- [] **Waitlist Check:** Is your waitlist consistently longer than 8 weeks?
- [] **Time Audit:** Are you spending more than 10 hours/week on administrative tasks (billing, scheduling, lab tracking)?
- [] **Revenue Model:** Are you currently 100% "Fee-for-Service" (trading hours for dollars)?
- [] **Mental Bandwidth:** Do you feel "capped" or at risk of burnout?
- [] **CEO Day:** Do you have at least 4 hours of non-clinical time blocked weekly for strategy?

Section 2: R.O.O.T.S. Method™ SOP Readiness

To scale, your "system" must be the product. Rate your current documentation of the R.O.O.T.S. phases.

Phase	Systemized? (Check if Yes)	Current Tool Used (e.g., Portal, Form, PDF)
REVEAL: Standardized Intake (MSQ/Toxicity)	[]	
ORGANIZE: Shared Digital Matrix for Team	[]	
OPTIMIZE: Automated Foundation Protocols	[]	
TARGET: Peer-Review/Grand Rounds Process	[]	
SUSTAIN: Coach-led 3/6 Month Check-ins	[]	

Section 3: The "Pod" Infrastructure Inventory

The "Pod" (1 Clinician + 1 Coach + 1 Admin) is the engine of a \$500k+ practice. Identify your gaps.

Role/Tech	Status (Active/Hiring/Needed)	Primary Responsibility
Operations Admin		Reclaiming practitioner time
Health Coach		Managing the "Sustain" phase
Functional EMR		Lab integration & Charting
Supplement Dispensary		Automated revenue (e.g., Fullscript)
Project Management		Tracking patient journey (e.g., Asana)

Section 4: Scaling Readiness Score

Total Checkboxes Marked (Sections 1-3): _ / 15

Scoring Key: * 0-5: Focus on Clinical Mastery. Establish your R.O.O.T.S. protocols first. * 6-10: Transition Zone. Hire an Operations Assistant and implement a Membership Model. * 11-15: Ready to Scale. Implement the full "Pod Model" and shift to 20 hours of clinical work/week.

Observations & Bottlenecks:

Next Steps:

1. Immediate Hire: _____
 2. SOP to Document this Week: _____
 3. Revenue Model Adjustment Date: _____
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