

Scaling Strategy & Funnel Architect

Practitioner Name: __ Date: _____

Section 1: The "Education-First" Funnel Design

Use this section to map out your webinar or workshop content to ensure it moves the lead through the "Reveal" phase of the R.O.O.T.S. Method™.

- The Hook (Specific Symptom/Pain Point): _____
- The Paradigm Shift (Symptom Suppression vs. Root Cause): _____
- The Mechanism (How the R.O.O.T.S. Method™ solves it): _____
- The Call to Action (Clinical Strategy Session): _____

Section 2: Multi-Channel Ecosystem Audit

Check the channels you are currently using and identify one "Growth Channel" to implement this quarter.

Channel Type	Status	Primary Goal	Next Action Step
Organic (SEO/Blog)	<input type="checkbox"/>	Authority	
Paid Traffic (Meta/Google)	<input type="checkbox"/>	Immediate Leads	
Social Authority (IG/LI)	<input type="checkbox"/>	Community/Nurture	
Joint Ventures (Referrals)	<input type="checkbox"/>	Pre-qualified Trust	

Section 3: The Scaling Math (Monthly Tracker)

Work with your VA or Practice Manager to fill this out monthly. Aim for an LTV:CAC ratio of at least 5:1.

Metric	Current Month	Target
Total Marketing Spend (A)	\$	\$
Total New Leads	#	#

Metric	Current Month	Target
New Enrollments (B)	#	#
Customer Acquisition Cost (A ÷ B)	\$	\$ < 20% of Program Price
Program Price (LTV)	\$	\$
LTV : CAC Ratio	: 1	5 : 1

Section 4: Enrollment Psychology (Discovery Call Prep)

Before your next high-ticket enrollment call, define the "Cost of Inaction" for your niche.

- Financial Cost of Inaction (Medical bills, lost work): _____
- Emotional/Physical Cost (Where will they be in 5 years?): _____

CEO Reflection & Strategy

What is the primary bottleneck in your scaling machine right now? (e.g., Not enough leads, low webinar attendance, poor conversion on calls).

Top 3 CEO Priorities for next 30 days: 1. [] _____ 2. [] _____ 3. [] _____

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