The Practitioner-to-CEO Transition Tracker

Practitioner Name: __ *Date:* _____

Section 1: The "Owner's Trap" Diagnostic

Check all that apply to your current practice state to identify bottlenecks.

- [ ] **Revenue Dependency:** If I take a 2-week vacation, my practice revenue drops to zero.

- [ ] **The "Only One" Syndrome:** I feel I am the only person capable of doing intakes or lab reviews.

- [ ] **The Success Ceiling:** I am fully booked but cannot increase income without adding more hours.

- [ ] **Operational Fatigue:** I spend more than 5 hours a week on billing, scheduling, or tech issues.

- [ ] **Vision Neglect:** I haven't spent time on long-term strategy or partnerships in the last 30 days.

- [ ] **Clinical Burnout:** I feel "drained" rather than "energized" by my patient load.

Section 2: The $1,000/hr Time Audit

Track your primary activities for the week. Categorize them by their value to the business.

Task Description	Value Category ($10, $100, $1,000)	Delegate? (Y/N)
Example: Answering basic emails	$10	Y
Example: New Patient "Reveal" Session	$1,000	N

Value Guide: * **$10/hr:** Admin, filing, data entry, social media posting, basic emails. * **$100/hr:** Standard follow-ups, routine lab reviews, clinical charting. * **$1,000/hr:** Strategic

partnerships, high-ticket conversions, creating automated programs, public speaking, "CEO Day" planning.

Section 3: Reflection & Scaling Strategy

Current Hourly Breakdown: Estimated hours spent on $10-$100 tasks: _ */ week. Estimated hours spent on $1,000 tasks: _* / week.

The "First Leap" Identification: Based on the audit above, what is the **one** task that drains your energy most but has the lowest financial value?

The CEO Day: Which day of the week will you block off (start with a half-day) to work *on* the business instead of *in* it? Day: __ *Time Block:* __

Next Steps:

1. **SOP Creation:** Write a 1-page Standard Operating Procedure for the lowest-value task identified above.

2. **First Hire/Task Delegation:** Identify if this task goes to a Virtual Assistant, Patient Coordinator, or Health Coach.

3. **Mission Alignment:** Review your core values to ensure your first hire fits the "Radical Patient Empowerment" culture.

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