WHERE DO YOU STAND?

YOUR BUSINESS LEVEL SCORECARD

ACS Results



THE HEADLESS CHICKEN

LEVEL 1



THE BABYSITTER

LEVEL 2



THE FISHERMAN

LEVEL 3



THE COACH

LEVEL 4



THE STRATEGIST

LEVEL 5



THE CONQUERER

LEVEL 6

TOOLS + SOFTWARE

- ☐ Everything lives in your head - nothing is written down
- ☐ There's no consistent system to track jobs or customer experience
- ☐ There's no consistent process for sales, hiring, or admin yet
- ☐ Everything is reactive and ad-hoc

- ☐ Website forms and calls reach one inbox
- ☐ Missed calls get a follow-up text
- ☐ You can see which quotes need a reply
- ☐ Calls and quotes tracked in a simple CRM

- ☐ Lead forms and CRM work together
- ☐ Automated follow-up keeps quotes moving
- ☐ Client onboarding is documented
- ☐ CRM keeps follow-up and team handoffs visible

- ☐ Systems run with minimal owner input
- ☐ Email and review requests run automatically
- ☐ Dashboards show lead costs and booked revenue
- ☐ Your team follows one lead-handling playbook

- ☐ Strategic KPIs are tracked monthly
- ☐ GM or director roles installed
- ☐ Data drives decisions
- ☐ SOPs are reviewed and improved quarterly

- ☐ Executive dashboards are in place (CEO, CFO)
- ☐ Succession plan formalized
- ☐ Governance structure in place
- ☐ Vision and culture guide every decision

TEAM

- ☐ Running solo without any employees yet
- ☐ All labor and client work handled personally
- ☐ Every bid, estimate, and admin task still lands on one desk
- ☐ Delegation still feels risky or uncomfortable

- ☐ Hired 1-3 helpers or labourers
- ☐ Still direct every step on site
- ☐ Crew relies on you to solve all problems
- ☐ You train on the job with no process

- ☐ Foreman or crew leader runs jobs
- ☐ Office/admin help handles support
- ☐ Team can function without you for a few days
- ☐ Hiring is structured

- ☐ Multiple foremen or team leads
- ☐ Sales rep closes jobs without you
- ☐ Admin handles operations smoothly
- ☐ Weekly team syncs and 1:1s

- ☐ GM or ops director oversees daily ops
- ☐ Owner has zero reports
- ☐ Hiring systems for management layers
- ☐ Leadership training is in place

- ☐ Full C-suite (CEO, CFO, CMO, VPs) in place
- ☐ Owner removed from day-to-day reporting structure
- ☐ Annual retreat or summit for alignment
- ☐ Organization has 100+ employees or is a scaled model

LEAD GENERATION

- ☐ Rely solely on referrals or repeat clients
- ☐ Lead sources are inconsistent or non-existent
- ☐ There's no budget or plan guiding your marketing
- ☐ Still no CRM or defined sales pipeline

- ☐ Referrals plus a website and Google profile
- ☐ Local SEO, reviews and job photos build trust
- ☐ Bookings aren't consistent beyond a month or two
- ☐ Still unsure what a lead actually costs

- ☐ Running 1-2 lead gen channels consistently
- ☐ Booked 1-2 months out
- ☐ Starting to measure CPL/ROI
- ☐ Ads, social proof and email follow-up are in play

- ☐ Sales team follows a defined process
- ☐ Multiple jobs in pipeline
- ☐ Client experience is standardized
- ☐ Team collects reviews and encourages repeat work

- ☐ Marketing spend and ROI are tracked
- ☐ Sales process has scaled to multiple locations
- ☐ Franchise/licensing possibly in play
- ☐ Team leads manage sales ops

- ☐ Lead gen driven by brand or network effects
- ☐ Markets expanded or acquired
- ☐ Leadership pipeline developed
- ☐ Passive channels (e.g. licensing, M&A) are active

OWNER ROLE

- ☐ On the tools every day
- ☐ Working nights and weekends to stay afloat
- ☐ Make every decision yourself
- ☐ Burned out but afraid to slow down

- ☐ Still managing job sites hands-on
- ☐ Every call still rings through to your phone
- ☐ Admin and quoting still eat into your nights
- ☐ Wanting more freedom but unsure how to create it

- ☐ No longer on the tools
- ☐ You now visit job sites as a manager, not a worker
- ☐ Hiring, planning, and sales are your focus
- ☐ Still putting out some fires

- ☐ You coach the team, not run it
- ☐ Work less than 20 hours per week
- ☐ Schedule is 90% flexible
- ☐ You spend your time building people, not swinging tools

- ☐ You don't touch daily operations anymore
- ☐ Focus is on strategic expansion or acquisitions
- ☐ Growth no longer depends on your hours
- ☐ You check in quarterly, not daily

- ☐ Owner works less than 5 hours per week
- ☐ Focus on investments, board leadership, or philanthropy
- ☐ Public presence or succession focus
- ☐ Legacy and generational impact drive your decisions

REVENUE + PROFIT

- ☐ Margins are unclear or not consistently tracked
- ☐ Take home under $80K/year
- ☐ Pricing still changes from job to job with no set strategy
- ☐ Cash flow is always tight

- ☐ Margins vary: some jobs hit 30-50%, others don't
- ☐ Revenue and profits swing month to month
- ☐ You can't see which channels bring paying jobs
- ☐ Unanswered calls and quotes still cost you jobs

- ☐ Jobs consistently priced for 40%+ gross profit
- ☐ You know what you spend to win a booked job
- ☐ Monthly reports track revenue, profit and sold jobs by source
- ☐ More quotes become booked, paying jobs

- ☐ $400K+ profit range annually
- ☐ Monthly revenue and profit targets hit
- ☐ Marketing spend is tied to sold work
- ☐ Owner is no longer tied to income

- ☐ Profit exceeds $1M
- ☐ Revenue is diversified
- ☐ Cash reserves and investments are growing
- ☐ Exit or legacy plan is in motion

- ☐ Business generates passive cash flow
- ☐ Exit value exceeds $10M
- ☐ Generational wealth secured
- ☐ Zero operational reliance on the owner

SCORE

/20 | /20 | /20 | /20 | /20 | /20

WHERE ACS PLUGS IN

- ■ Lead Generation Levels 1-4
- ☐ Tools + Software and Revenue Levels 2-4

Arrows connect the supporting areas to Lead Generation.

HOW TO USE THIS SCORECARD

This isn't a quiz. It's a mirror. Follow these steps below:

STEP 1: FIND YOUR CURRENT LEVEL

Work your way through each level.

If any part of it feels true, that's where you currently are.

Level 1: You're still on the tools and doing everything yourself.

Level 2: You have a small team but still need to be everywhere.

Level 3: You're off the tools, but still manage daily work

Level 4: Your team runs jobs. You manage through others.

Level 5: You lead through strategy. Others run operations.

Level 6: Your business runs and grows without you.

STEP 2: Only Score Yourself in That Level

Once you've identified your current level, only check the boxes in that section that reflect your current reality.

Don't score yourself in previous or future levels.

You're measuring progress within your current stage, not across all of them.

STEP 3: Ready to Evolve?

At the bottom of each level, you'll find a score field. If you check 80% or more, you're likely ready to move up to the next level.