TIFFANY MICHELLE & CO.

Created by Tiffany Patterson

The CEO Reality Check

> *Your quick reality check before you build anything else*

A practical self-assessment to uncover the operational friction affecting your revenue, capacity, and growth.

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MEET YOUR GUIDE

The business behind the business.



The fact that you downloaded this tells me something.

You've built something real, and you're willing to pause and ask what actually needs to change.

I'm Tiffany, a Business Systems & Operations Advisor. I help founders understand what is happening behind the scenes of their businesses.

Across legal, corporate, and founder-led environments, I've seen how familiar issues become bigger problems when processes, systems, and responsibilities aren't connected.

My work helps business owners see those connections and decide what deserves attention before adding more complexity.

Dig into this Reality Check honestly. Notice what it reveals.

READY TO CONNECT THE DOTS?

Finish the Reality Check, then join the free session to see how familiar operational issues may affect revenue, customer experience, and capacity.

EXPLORE THE FREE WEBINAR →

BEFORE YOU START

Before you build anything else... pause.

The issue isn't always a lack of ideas, offers, or tools. Sometimes what you've already built is not fully working, is not fully supported, or depends too heavily on you.

HOW TO USE THIS

This isn't a test, and there are no right or wrong answers. As you go through each section, check the statements that feel true in your business right now. You are identifying clues, not receiving a diagnosis.

Use the notes to capture real examples. Look for patterns that repeat across more than one section. The reflection at the end will help you connect those patterns and consider what deserves attention next.

A reminder: checking more boxes does not automatically mean more problems. One issue may show up in several areas. The aim is to understand what you are experiencing, not to jump immediately to solutions.

This worksheet is fillable. Click any checkbox or notes area to type directly, then save your copy.

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01 / PERSON-DEPENDENT

When your business depends too much on you

It's natural to be involved in the business you've built. But there's a difference between leading it and being required for nearly everything to move forward. Consider what happens when you're unavailable and how decisions get made.

Check any statements that reflect your experience today.

- [ ] Things slow down or stall when you are not actively involved
- [ ] You are the default decision-maker for most things
- [ ] You are involved in too many day-to-day tasks
- [ ] You feel like you cannot fully unplug without something breaking
- [ ] Growth feels tied to how much you personally can handle

WHAT THIS MAY MEAN

When too many decisions and tasks depend on one person, delays and capacity constraints can affect service delivery, customer response times, and growth.

WHAT MAY NEED ATTENTION

Examine which decisions, approvals, information, or tasks rely on you. Consider ownership, delegation, documented processes, and how work moves without you.

NOTES & OBSERVATIONS

What stands out? Where does this show up in your business?

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02 / ADDING INSTEAD OF ACTIVATING

When you're adding instead of improving what exists

New offers, tools, and initiatives can create opportunities, but more doesn't always mean better. Think about what you've added over time and whether those investments are working together or creating more complexity.

Check any statements that reflect your experience today.

- [ ] You have created multiple offers, but not all are performing well
- [ ] You have added new tools or platforms to try to fix existing issues
- [ ] You build something new instead of improving what is already there
- [ ] Your business feels layered instead of streamlined
- [ ] You are not fully using what you have already built

WHAT THIS MAY MEAN

Adding tools and offers without improving what exists may increase costs, duplication, complexity, and the effort required to deliver results.

WHAT MAY NEED ATTENTION

Look at which existing offers, tools, and workflows are underused. Consider whether simplifying, connecting, or optimizing them would serve you better than adding more.

NOTES & OBSERVATIONS

What stands out? Where does this show up in your business?

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03 / DISCONNECTED SYSTEMS

When your systems aren't fully supporting you

Having systems isn't the same as having systems that work well together. Think about how customers, information, and work move through your business, and where people still repeat tasks or rely on workarounds.

Check any statements that reflect your experience today.

- [ ] Your backend systems feel disconnected or unclear
- [ ] There is no clean flow: lead → client → delivery → follow-up
- [ ] Things are more manual than they should be
- [ ] Leads don't always get a timely or consistent follow-up
- [ ] You have built systems, but they are not being fully used

WHAT THIS MAY MEAN

Disconnected workflows can create repeated work, information gaps, uneven follow-up, and missed opportunities from inquiry through retention.

WHAT MAY NEED ATTENTION

Trace an actual customer or lead journey. Check where information is passed, who owns the next action, and whether your tools support the intended process.

NOTES & OBSERVATIONS

What stands out? Where does this show up in your business?

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04 / UNSUPPORTED CLIENT JOURNEY

When your client journey isn't fully structured

Clients experience more than the service you deliver. Consider the communications, handoffs, and processes surrounding your work. How consistent is that experience from onboarding through follow-up?

Check any statements that reflect your experience today.

- [ ] Clients rely on you instead of a structured process
- [ ] Onboarding feels inconsistent or unclear
- [ ] Follow-up or retention systems are minimal or missing
- [ ] The client experience varies depending on what is happening behind the scenes
- [ ] Clients rarely renew, return, or refer unless you prompt them

WHAT THIS MAY MEAN

An inconsistent client journey can cause confusion, delays, greater support demands, and missed opportunities for retention, referrals, and repeat business.

WHAT MAY NEED ATTENTION

Review the experience from inquiry to onboarding, delivery, follow-up, and renewal. Identify gaps in expectations, ownership, communication, and handoffs.

NOTES & OBSERVATIONS

What stands out? Where does this show up in your business?

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05 / HIDDEN FRICTION POINTS

When things feel slower or harder than they should

Not every operational issue looks like a major breakdown. Sometimes it's delays, repeated questions, and small workarounds that become normal. Notice the everyday activities taking more time and effort than they should.

Check any statements that reflect your experience today.

- [ ] Things take longer than expected to complete
- [ ] Inquiries or proposals go quiet without a clear next step
- [ ] Work gets stuck waiting on decisions, direction, or clarity
- [ ] You feel like you are constantly putting out fires
- [ ] There are known issues you have not had time to fix

WHAT THIS MAY MEAN

Small delays and repeated work may compound into slower delivery, stalled sales, higher labor costs, customer frustration, and reduced capacity.

WHAT MAY NEED ATTENTION

Look for recurring handoffs, approval delays, rework, and workarounds. Ask which problems are isolated and which affect multiple parts of the operation.

NOTES & OBSERVATIONS

What stands out? Where does this show up in your business?

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06 / DELEGATION BREAKDOWN

When support and delegation aren't working

Bringing in help doesn't automatically create capacity. Consider how work is assigned, explained, completed, and reviewed. Can others take ownership, or does progress still require your ongoing involvement?

Check any statements that reflect your experience today.

- [ ] Delegation feels inconsistent or frustrating
- [ ] You are unsure what to hand off versus what to keep
- [ ] You have hired help, but it has not worked the way you expected
- [ ] You often think it is easier to do it yourself
- [ ] Your team or support does not operate from clear systems

WHAT THIS MAY MEAN

When responsibilities and expectations are unclear, work returns to the founder, slowing decisions and limiting the value of team investments.

WHAT MAY NEED ATTENTION

Check whether tasks have clear owners, decision authority, instructions, measures of success, and workable handoffs before adding more support.

NOTES & OBSERVATIONS

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07 / SUSTAINABILITY GAP

When your business isn't fully sustainable

A business can generate revenue and still demand too much effort to sustain. Consider what it takes to maintain your results. Is growth creating more capacity, or simply more demands on your time and attention?

Check any statements that reflect your experience today.

- [ ] Your business feels heavier than it should
- [ ] You are busy, but not always moving forward strategically
- [ ] Revenue is coming in, but it requires a lot of effort to maintain
- [ ] You can't easily see where leads, sales, or clients drop off
- [ ] You know things could work better, but are not sure what to fix first

WHAT THIS MAY MEAN

Revenue can grow while the business becomes harder to sustain. Excess effort, inconsistent capacity, and founder dependence may raise costs and limit growth.

WHAT MAY NEED ATTENTION

Consider whether current revenue, delivery, staffing, and processes can support your goals without proportionally increasing your time and workload, and whether you have the information to see where results are being won or lost.

NOTES & OBSERVATIONS

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IF YOU CHECKED MULTIPLE SECTIONS

This isn't a list of separate problems.

Your business may not be fully structured to support the level of growth you are trying to create.

The patterns may be connected.

One issue can create friction in several parts of the business. Before adding more, consider what may be driving the patterns, how the consequences spread, and what needs to be verified.

The purpose of this Reality Check is not to label your business. It is to help you observe familiar issues more carefully, understand how they might connect, and move toward more informed decisions.

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FROM RECOGNITION TO ACTION

Connect the Dots

Choose one issue that stands out. Use the prompts below to explore it before jumping to a solution. You do not need every answer yet.

01 / RECOGNITION

What am I noticing? Describe one recurring issue or pattern.

02 / CONNECTION

Where else might this appear? Consider people, handoffs, processes, technology, and customer experience.

03 / IMPLICATION

How might this affect revenue, customer experience, capacity, cost, or risk?

04 / DIRECTION

What should I clarify, verify, or explore before deciding what to change?

The goal is not more problems. It is better decisions about the ones that matter.

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YOUR NEXT STEP

You have identified the patterns.

Now let's connect the dots.

Recognizing what is happening is a start. Understanding how issues connect, what they may be affecting, and what to do next often requires looking beyond the obvious symptoms.

CONTINUE THE CONVERSATION / FREE WEBINAR

Where Is Your Business Leaking Revenue?

Explore how familiar operational challenges can affect revenue, customer experience, and capacity, and learn a more strategic way to decide what deserves attention.

REGISTER FOR THE NEXT FREE WEBINAR →

EXPLORE YOUR NEXT STEP

Start with The CEO Reset to identify priorities and make practical improvements. For a focused challenge or decision, explore the CEO Clarity Session. For deeper, interconnected issues, consider the Revenue & Operations Diagnostic.

EXPLORE WAYS TO WORK TOGETHER →

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A FINAL THOUGHT

Build better before you build bigger.

The goal of this Reality Check wasn't to give you another list of things to fix. It was to help you look more closely at what you have built, recognize what may need attention, and begin connecting the dots.

Some improvements may be simple. Others may need deeper investigation. What matters is making thoughtful decisions about what to change and why.

You do not have to fix everything at once. Start with what matters most.

STAY CONNECTED

Let's keep the conversation going.

I share practical perspectives on business strategy, systems, operations, customer experience, and sustainable growth.

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