Services For You

2027 Vision-to-System Gap Assessment

A companion worksheet for "From Vision to System: Preparing to Scale" — Paula Allen

STEP 1 | Clarify Your Vision

Your vision needs to be specific enough to act on. Answer in a sentence or two:

1. By the end of 2027, my business will be

2. The number that tells me I succeeded is

3. The biggest change from how I run my business today is

Tip: If your answer feels vague, keep asking "what does that actually look like day-to-day?" until it's concrete.

STEP 2 | Identify Your Vision-to-System Gaps

For each area, mark how it runs today: **Manual** (you or your memory), **Partly** automated, or a full **System**. Then rate the gap cost: 1 = minor, 5 = costing me time or money every week.

Business Area	Manual	Partly	System	Gap cost 1 to 5
Lead Follow-Up				
Client Onboarding				
Sales Process / Pipeline				
Scheduling & Reminders				
Service / Product Delivery				
Communication & Nurture				
Reporting & Tracking				
Team / Delegation Handoffs				

Which "Manual" items are costing you the most time or growth right now?

STEP 3 | Start With One System, Not Ten

You don't need to fix everything at once — fix the **right thing** first. Plot your biggest gaps from Step 2 on the matrix below:

BUILD THIS FIRST high impact, low/med effort	**PLAN FOR LATER** high impact, high effort
QUICK WIN low impact, low effort	**SKIP FOR NOW** low impact, high effort

< Low Effort **High Effort >**

My ONE system to build or upgrade first in 2027 is

The smallest version of it (trigger, action, result):

The first step I'll take this week is

"When your strategy, systems, and vision align, success is inevitable."

Need Strategy and/or Support? Book a free call with Paula:

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