



Are You the Bottleneck in Your Own Business?

A Self-Scoring Checklist for Solo Professionals & Small Business Owners

This checklist is designed to show you exactly where your time is going — and what it's costing you. Go through each task below. Check every column that applies. Be honest. No one's grading you. When you're done, tally up each column and follow the scoring guide at the end. What you find just might surprise you.

Column Guide: **A** = I'm doing this myself | **B** = Is / could be automated | **C** = I want help setting up or managing this | **N/A** = Doesn't apply to me

Task	A	B	C	N/A
COMMUNICATION & INBOX	A	B	C	N/A
Responding to new inquiries <i>First impressions matter — delays cost you clients</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing your inbox daily <i>Sorting, flagging, deleting, replying</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setting up email filters and folders <i>One-time setup with ongoing maintenance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending follow-up emails <i>After calls, proposals, or no-responses</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setting up email auto-responders <i>Can be automated; needs someone to write and maintain them</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Answering support or service emails <i>Refunds, questions, troubleshooting</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SCHEDULING & CALENDAR	A	B	C	N/A
Scheduling calls, meetings, consultations <i>Back-and-forth coordination drains time</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setting up your scheduling software <i>Calendly, TidyCal, Acuity — setup is a one-time task</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing cancellations and reschedules <i>Repetitive and interruptive</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending appointment reminders <i>Easily automated with the right setup</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing calendar conflicts and time zones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT ONBOARDING	A	B	C	N/A
Sending welcome emails to new clients <i>Should be templated and automated</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Task	A	B	C	N/A
Sending and tracking intake forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setting up new client folders <i>Repetitive — same process every time</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending contracts or agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Following up on unsigned documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DURING THE WORK	A	B	C	N/A
Sending project updates to clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing ongoing email threads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking deadlines and deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scheduling follow-up appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data entry or CRM updates <i>High time cost, low skill requirement</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Researching contacts or topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BILLING & PAYMENTS	A	B	C	N/A
Creating and sending invoices <i>Can be templated or automated</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Following up on unpaid invoices <i>Uncomfortable and time-consuming</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking payments received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing expense reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADMIN & ORGANIZATION	A	B	C	N/A
Organizing digital files and folders <i>See also: 'I know it's here somewhere'</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Updating or monitoring software subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating or maintaining to-do lists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proofreading documents, emails, proposals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating graphics or visuals (Canva, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordering supplies or managing vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CONTENT & SOCIAL MEDIA	A	B	C	N/A
Writing or scheduling newsletters <i>Can be written ahead and automated</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Writing or scheduling social media posts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing social media comments and DMs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formatting and uploading blog posts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repurposing existing content across platforms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Researching content topics or hashtags	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Task	A	B	C	N/A
AFTER THE WORK	A	B	C	N/A
Sending project completion notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requesting testimonials or reviews <i>Often skipped — easy to automate</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sending thank-you follow-ups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Archiving completed client files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COLUMN TOTALS	A: <input type="text"/>	B: <input type="text"/>	C: <input type="text"/>	

SCORING GUIDE

Add up your totals from **Columns A, B, and C combined**. That number tells the full story — not just what you're doing manually, but where automation is missing and where you already know you need support.

■ ZONE 1: You're Holding Steady (Combined Score: 0–12)

You're managing well for now. Your backend isn't overwhelming you — yet. But keep this checklist handy. Most business owners pass through this zone faster than they expect. When things start to shift, you'll know exactly where to look first.

■ ZONE 2: The Messy Middle (Combined Score: 13–24)

You're in it. The work is piling up in places you can feel but maybe can't name yet. The admin is quietly competing with the work that actually moves your business forward. This is the zone where a **Strategic Mapping Session** makes the most sense — not a full handoff, but a focused hour to figure out exactly what needs to happen next. You walk away with a clear action plan and a written summary so nothing gets lost.

■ ZONE 3: The Overwhelm Zone (Combined Score: 25+)

The backend has taken over. You're so deep in the minutia that your zone of genius is getting crowded out. This isn't a discipline problem. It's a systems and support problem — and it's solvable. This is where consistent, dedicated VA support makes an immediate difference. Let's start with a **free 30-minute consultation** to look at what's pulling you away from your best work and map out what real support could look like for your business.

YOUR TIME & MONEY SNAPSHOT

Now let's put real numbers to what you just found. Fill in the blanks.

STEP 1 — Your Hours Lost Per Week

Column A total: tasks × 30 min avg = hours/week doing it manually

Column B total: tasks × 30 min avg = hours/week on unautomated tasks

Combined total: hours per week spent on work that isn't yours to do

STEP 2 — What It's Costing You

Your target hourly rate:

Weekly cost: hours × = lost per week

Annual cost: Weekly total × 52 = lost per year

STEP 3 — What VA Support Actually Costs

VA support rate: \$50–\$65/hour

Same hours, VA rate: hours × \$57.50 avg = per week for VA support

STEP 4 — Your ROI Gap

Weekly cost of doing it yourself:

Weekly cost of VA support:

Your weekly ROI: back in your pocket — every week.

That gap is not an expense. It's what you get back. Every hour you stop doing work that isn't yours — is an hour you get to lead.

Ready to stop doing it all yourself?

Strategic Mapping Session — Sometimes you don't need more tasks managed. You need someone to think alongside you. This focused one-hour session digs into the one thing most disrupting your business right now. You walk away with a clear action plan and a documented written summary so nothing gets lost.

Free 30-Minute Consultation — Not sure where to start? Let's talk. We'll look at your top pain points together and decide if we're a good fit. No pressure. Just a real conversation.

■ **Book your free consultation: tidycal.com/dmva/consult**