

SYSTEMS

STRATEGY

SANITY

# FRACTIONAL COO BUSINESS CLARITY TOOLKIT

*Clarity for founders doing things differently.*

NEW LEAF FRACTIONAL COO SERVICES

# WELCOME!

## Streamline chaos → scale with clarity.

Running a business can feel like juggling strategy, sales, and sanity — all at once.

**BONUS**  
on last page!

This toolkit helps you step back and see the full picture. It's designed to highlight where your systems, people, and profits might be misaligned — so you can fix what's costing you time and money.

Answer honestly. This isn't about perfection, it's about awareness. Clarity is the first step to calm, confident growth.

### How to Use This Toolkit:

1. Start with the Business Foundations Checklist (a snapshot of the essentials).
2. Complete the Business Clarity Audit (your deeper diagnostic).
3. Circle your weakest area, that's your "Fix First".
4. Book your free strategy call, I'll help you turn clarity into an action plan.

You've got this! And if you don't, that's what I'm here for.

-Jessie Taylor (she/her)

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# BUSINESS FOUNDATIONS CHECKLIST

*A quick snapshot of your operational health.*

## CEO Clarity

*Your big-picture direction and decision-making.*

- ☐ Do you have a 12-month business plan?
- ☐ Are revenue targets tracked monthly?
- ☐ Do you review strategy at least quarterly?

## Operations & Systems

*Your behind-the-scenes efficiency.*

- ☐ Do you have standard operating procedures (SOPs) for your core workflows?
- ☐ Is your project management system consistently used?
- ☐ Are your files centralized and easy to access?

## Money & Metrics

*The numbers that tell your story.*

- ☐ Do you know your monthly cashflow?
- ☐ Do you track profit margins per service or product?
- ☐ Do you review KPIs regularly?

# BUSINESS FOUNDATIONS CHECKLIST

*A quick snapshot of your operational health.*

## People & Delegation

*Your structure and workload balance.*

☐

Are team roles clearly defined?

☐

Do you have a capacity/workload tracker?

☐

Are check-ins and reporting systems consistent?

## Visibility & Growth

*Your ability to attract and retain business.*

☐

Is there a 12-month marketing plan?

☐

Do you track lead generation and conversions?

☐

Do you have a system for nurturing leads/clients?

Notes:

*\*Circle or star anything that feels unclear, inconsistent, or stressful.  
That's your first fix!*

# BUSINESS CLARITY AUDIT

*A deeper diagnostic to uncover what's working, what's not, and where to focus next.*

Operations	Y	N
Are daily workflows documented?		
Can someone else run your business if you took a week off?		
Do you have repeatable systems for onboarding clients/customers?		
Is your tech stack integrated and efficient?		
Do projects regularly finish on time?		
Notes: <i>Systems are the soil your business grows in, nurture them before planting something new.</i>		

Money & Metrics	Y	N
Do you review financial reports monthly?		
Are invoices tracked and reconciled on time?		
Do you know your profit margins?		
Do you have a budget for strategic growth initiatives?		
Do you track ROI on marketing and sales?		
Notes: <i>How well do you understand your financial landscape?</i>		

# BUSINESS CLARITY AUDIT

People & Culture	Y	N
Are job roles clear for everyone on your team?		
Do you have a process for performance feedback?		
Are you confident your team isn't overworked?		
Are tasks delegated effectively (not stuck on you)?		
Do you celebrate wins as a team?		
Notes: <i>Your team should be your greatest asset, not your bottleneck.</i>		
Visibility & Growth	Y	N
Do you have a 12-month marketing plan?		
Do you track lead generation and conversions?		
Do you have an active email list?		
Are your offers/services priced strategically for growth?		
Do you have a system to ask for testimonials, referrals, etc.?		
Notes: <i>Are you consistently showing up and converting visibility into opportunity?</i>		

# YOUR RESULTS & NEXT STEPS

## Scoring Guide:

**16–20 Yes:** On track, optimization mode!

**10–15 Yes:** = Growth opportunities ahead, refine systems and scale intentionally.

**<10 Yes:** = Chaos is costing you money, time to build structure and calm.

Circle your weakest category — that's your "Fix First" focus. Then choose one action you can take this week to improve it. Small, consistent changes are the key to sustainable growth.



Clarity without action is just awareness.  
Let's turn your insights into a strategy, one  
new leaf at a time!

By downloading this, you've already taken the first step toward calm, confident growth

Business doesn't have to feel chaotic, and you don't have to do it alone.

- 👉 Book your Free Clarity Call
- 👉 Follow @newleafgsi for more tools, systems, and strategy tips.



**BONUS!**

# **Your Next 5 Quick Wins**

## FOR CLARITY

Write or update your 12-month business plan.

Centralize your files in one location (Google Drive, OneDrive, etc.).

Document one repeatable workflow in Trello or ClickUp.

Review one key metric (cash flow, margin, or KPI).

Schedule your next strategy review date.

Each win takes less than an hour, and moves you closer to calm, scalable growth.