

TOOL 01

The Filing Cabinet Audit

A 6-Question Domain Expertise Diagnostic — Is your expertise trapped in your head, or ready to scale?

You have years of hard-won expertise. Processes refined across dozens of engagements. But if your business stops when you stop, your expertise is locked in a filing cabinet that only you can open.

Score each question honestly. **0 = Not at all. 1 = Partially. 2 = Fully.**

QUESTION 1

Process Count

How many distinct processes do you perform during a typical client engagement?

SCORE	CRITERIA
0	I have never counted. I just do what needs doing.
1	I could name 10–20, but I know there are more I haven't articulated.
2	I have inventoried 50+ discrete processes with defined triggers, steps, and outputs.

Your score: _____

QUESTION 2

Documentation State

If you handed your methodology to a competent professional today, how much is documented well enough for them to follow?

SCORE	CRITERIA
0	Almost nothing. My processes live in my head and my habits.
1	Some templates and checklists exist, but they require me to explain the context.
2	My core methodology is documented with decision trees, scoring criteria, and step-by-step procedures.

Your score: _____

QUESTION 3

Repeatable vs. Judgment

What percentage of your work follows repeatable patterns versus requiring your specific expertise?

SCORE	CRITERIA
0	I have no idea. It all feels like expertise to me.
1	I suspect most is repeatable, but I haven't separated the routine from the craft.
2	I have classified my processes and know which are system-ready versus human-required.

Your score: _____

QUESTION 4

Revenue Ceiling

Is your income capped by the number of hours you can personally deliver?

SCORE	CRITERIA
0	Yes. More revenue requires more of my time, and I am at capacity.
1	Mostly. Some leveraged revenue, but the majority is time-for-money.
2	No. I have revenue streams that generate income independent of my direct involvement.

Your score: _____

QUESTION 5

Client Dependency

When clients call, do they ask for you specifically — or for the solution your system provides?

SCORE	CRITERIA
0	They want me. If I'm unavailable, the engagement doesn't happen.
1	They want me, but would accept a trained associate if one existed.
2	They want the outcome. The system delivers it regardless of my involvement.

Your score: _____

QUESTION 6

Transfer Readiness

Could someone with solid professional training deliver 80% of your results using your documented materials?

SCORE	CRITERIA
0	No. My materials are prompts for knowledge that lives in my head.
1	They could handle routine work, but complex cases would fall apart.
2	Yes. Following the procedures produces consistent results, with escalation paths for edge cases.

Your score: _____

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Scoring & Interpretation

Total your six scores, then read where you stand.

METRIC	SCORE (0–2)
1. Process Count	
2. Documentation State	
3. Repeatable vs. Judgment	
4. Revenue Ceiling	
5. Client Dependency	
6. Transfer Readiness	
TOTAL	

Interpretation

RED 0–4: Filing Cabinet Locked

Your expertise is valuable — and completely trapped. You are the system. Next step: set a 60-minute timer and list every process you perform during a typical engagement.

YELLOW 5–8: Partially Organized

You've started the extraction. Some processes are documented, but the system is incomplete. Next step: classify every process as Repeatable or Expertise-Required.

GREEN 9–12: Ready to Extract

Your expertise is documented, classified, and structured for transfer. Next step: score your repeatable processes on 5 dimensions to determine which to systematize first.

Organization is not systematization. A sorted filing cabinet is still a filing cabinet. The expertise is not in the documents — it's in the spaces between them.