Diana Lidstone
Coaching and Consulting

CEO FREEDOM *Audit*

Self-Assessment Worksheet



Use this worksheet to quickly identify bottlenecks, limiting beliefs ("invisible scripts"), and time-wasters in your business. Each section helps you discover where you need support so you can work less and profit more.

1. Step Over the Line:

What's Holding You Back? Reflect on what's keeping you stuck in the old way of doing business.

- What are the top 3 challenges that make you feel overwhelmed?
- What would your life look like if you could work less?

E.g., "If I ask for help, I've failed."

2. Limiting Beliefs:

Name Your Invisible Scripts

Identify the stories you tell yourself that keep you stuck.

- List any beliefs you have about asking for help, delegating, or growing your business. - How do these beliefs affect your decisions and actions?
- What new belief could help you step into CEO freedom?

OLD SCRIPT	NEW SCRIPT

3. 90-Day Vision Planner

Focus on one big goal for the next 90 days and plan your action.

- What is one major goal you want to achieve in the next 90 days?
- What is the biggest obstacle standing in your way?
- What is the one action you can take this week to move toward your goal?

4. My "Stop Doing" List

List tasks you can delegate or stop doing to create space for growth.

- What repetitive tasks drain your time and energy?
- Which tasks could you delegate to others or automate?
- What can you remove from your to-do list that doesn't align with your zone of genius?

5. Delegation & Support Scorecard

Assess how well you delegate and build support in your business.

- Do you have people or systems in place to handle routine tasks?
- How comfortable are you with delegating important tasks? (Scale 1–5) - What support or tools do you need to build a stronger support network?

6. Am I Ready for CEO Freedom? Checklist

Evaluate your readiness to step into CEO freedom.

- Do you know your vision and values clearly?
- Are your vision and values clearly written?
- Are you spending your time on high-impact activities that grow your business?
- Have you scheduled regular CEO Sanity Meetings to review and plan?
- Are you committed to starting to work less and profit more, starting now?

WHAT'S NEXT?



Book your CEO Freedom Strategy Session

Thank you for completing the CEO Freedom Audit!

To take the next step, book your complimentary CEO Freedom Strategy Session with Diana for a personalized action plan to work less, profit more, and reclaim your freedom



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WWW.DIANALIDSTONE.COM

Meet Diana



After almost four decades in business and working globally with coaches, consultants, and other service-based experts, Diana Lidstone has supported thousands of small business owners accelerate growth and explode profits. Her work embodies #worklessprofitmore!

She is a sought-after business and marketing strategist known for her straight talk, no BS approach and her clients results. She is a best-selling author, international speaker and podcast host. Her podcast, Work Less PROFIT More contains business strategies & interviews to help lawyers, accountants, financial advisors and other experts experience more joy, profit and freedom in their business.

Diana and her husband have recently moved to a small farm in Ontario where she is often found walking her dog, playing with her grandson and drinking champagne (not at the same time)!

In the fall of 2024, Diana was selected as a finalist for Ottawa's Business Woman of the Year award!

BOOK YOUR Session?

In this 20-minute session, we'll uncover your roadblocks and strategize the exact steps for you to work less and profit more based on your goals and your results.

Ready to Map Out Your Next Move?

Once you've completed your CEO Freedom Audit™ Worksheet, book your free 20-minute CEO Strategy Call. Together, we'll unpack your results and outline a clear plan to work less and profit more — based on your stage of growth and goals.

[BOOK YOUR FREE CEO STRATEGY CALL]