



5 CEO Shifts to Break Through the \$2M Plateau

Your Checklist for Scaling Smart from 7 Figures to \$5M

1. Shift 1: Own Your CEO Time

- ☐ Block 60–90 minutes per week to work on your business (not in it)
 - ☐ Create a recurring leadership team meeting—then honor it
 - ☐ Accept that showing up inconsistently will delay growth
 - ☐ Remind yourself: This is a muscle—you build it by using it
- “This is the beginning of becoming a leader, not just an operator.”

2. Shift 2: Lead People with Clarity

- ☐ Identify which roles you’ve handed off—and define their measurable goals
 - ☐ Set KPIs and regular check-ins for each team member
 - ☐ Stop assuming hard-working people will figure it out without direction
 - ☐ Understand: Even great people need structure to thrive
- “If your people don’t know what winning looks like, how can they get there?”

3. Shift 3: Rebuild Systems for Scale

- ☐ Audit your current systems—where do handoffs break down with more people?
 - ☐ Re-map workflows that now include multiple salespeople, admins, installers
 - ☐ Reinforce accountability in systems that affect money, customer experience, and time
 - ☐ Accept that systems from \$1M–\$2M won’t scale to \$4M–\$5M without reinvention
- “The system didn’t break—there are just more people in it now.”



4. Shift 4: Know Your Numbers

- ☐ Review your P&L and balance sheet—do you really understand them?
- ☐ Ask yourself: Can I clearly say whether I can afford to hire or buy right now?
- ☐ Learn your benchmarks for profitability (Exciting Windows can help)
- ☐ Listen to episodes with Kimberly Merlitti and Michelle Williams (Profit is a Choice podcast)

“Most owners know how to make money. Fewer know how to manage it.”

5. Shift 5: Create a Marketing + Sales Machine

- ☐ Define your brand—what makes you different? (Listen to Nicole Heimer)
- ☐ Develop a 12-month marketing plan with budget + platforms
- ☐ Equip your sales team with real training—not just shadowing
- ☐ Enroll in the Make-a-Friend 7-Step Sales System at LuAnn University
- ☐ Remember: When you’re spending \$60K+ on marketing, your team must convert with skill

“At this level, referrals aren’t enough—it’s a machine now.”