

Rooted
Vision

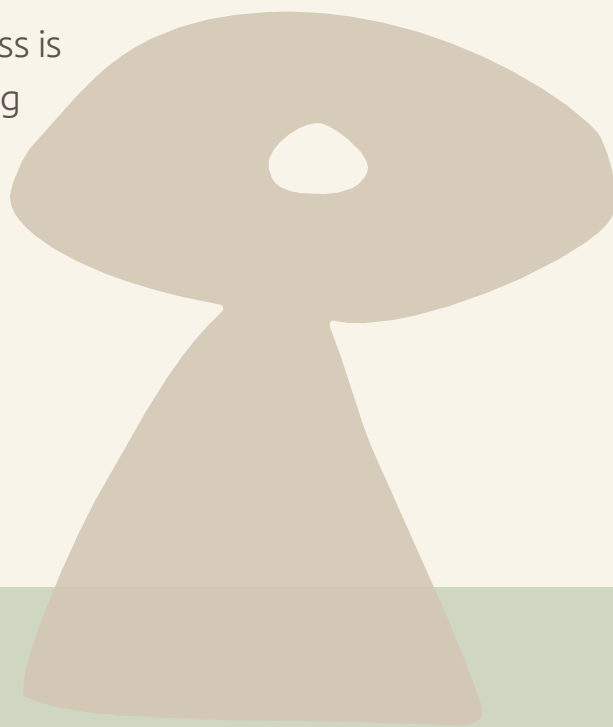


Studio

A FREE SELF-ASSESSMENT FOR FOUNDERS & LEADERS

The Rooted Check-up

Ten quiet minutes to see where your business is thriving, and where friction is quietly draining your energy.



A GIFT FROM HEIDI FEINSTEIN · ROOTED VISION STUDIO

WELCOME

Before you begin

Dear friend,

If you're holding this, chances are you care deeply about what you've built. Maybe the numbers look fine, and still something feels stuck, stretched, or harder than it should be.

I know that feeling well. When I was building Life Alive, there were seasons I was pouring everything I had into it and still hitting the same walls. What finally helped wasn't working harder. It was seeing clearly where the friction lived.

That's what this Check-up is for. It won't judge you, and it isn't a test. Think of it as a quiet mirror: twenty-four simple statements across the six areas that shape every healthy enterprise.

With warmth,

Heidi

Heidi Feinstein, MAET, NHC · Founder, Rooted Vision Studio

How to use it

1. **Find a quiet ten minutes.** Answer for how things are today, not how you hope they'll be.
2. **Circle one number for each statement.** Go with your first instinct.
3. **Add up each area** and carry your six totals to the scoring page.

① Not true at all ② Rarely true ③ Sometimes true ④ Mostly true ⑤ Completely true

01 Purpose & Direction

Why we exist, and where we're going

- | | | |
|-----|---|---------------------|
| 1.1 | Everyone on my team could explain why this business exists. | (1) (2) (3) (4) (5) |
| 1.2 | Our big decisions trace back to our mission. | (1) (2) (3) (4) (5) |
| 1.3 | I know what success looks like twelve months from now. | (1) (2) (3) (4) (5) |
| 1.4 | I still feel connected to why I started. | (1) (2) (3) (4) (5) |

AREA TOTAL / 20

02 The Leader's Load

How much of the business rests on you

- | | | |
|-----|---|---------------------|
| 2.1 | I can take a full day off without the business stalling. | (1) (2) (3) (4) (5) |
| 2.2 | Most decisions don't have to go through me. | (1) (2) (3) (4) (5) |
| 2.3 | I spend more of my week building the business than putting out fires. | (1) (2) (3) (4) (5) |
| 2.4 | I have energy left at the end of most weeks. | (1) (2) (3) (4) (5) |

AREA TOTAL / 20

03 Roles & People

Clarity, training, and trust

- | | | |
|-----|---|---------------------|
| 3.1 | Every role has clear responsibilities written down. | (1) (2) (3) (4) (5) |
| 3.2 | New people are trained the same way every time. | (1) (2) (3) (4) (5) |
| 3.3 | Turnover this past year has been manageable. | (1) (2) (3) (4) (5) |
| 3.4 | I have at least one person I trust to lead when I'm away. | (1) (2) (3) (4) (5) |

AREA TOTAL / 20

04 Systems & Flow

How the work actually gets done

- | | | |
|-----|---|---------------------|
| 4.1 | Our key processes are written down and actually used. | (1) (2) (3) (4) (5) |
| 4.2 | Our schedule fits the work, so we're rarely over- or under-staffed. | (1) (2) (3) (4) (5) |
| 4.3 | Handoffs between people and shifts happen without dropped balls. | (1) (2) (3) (4) (5) |
| 4.4 | Our tools make work easier rather than adding to it. | (1) (2) (3) (4) (5) |

AREA TOTAL / 20

05 Culture & Communication

How people speak, listen, and repair

- | | | |
|-----|---|---------------------|
| 5.1 | People raise problems early instead of working around them. | (1) (2) (3) (4) (5) |
| 5.2 | We have a regular meeting rhythm that people find useful. | (1) (2) (3) (4) (5) |
| 5.3 | My team would describe this as a good place to work. | (1) (2) (3) (4) (5) |
| 5.4 | Conflict gets resolved rather than buried. | (1) (2) (3) (4) (5) |

AREA TOTAL / 20

06 Readiness to Grow

Room, clarity, and capacity for what's next

- | | | |
|-----|---|---------------------|
| 6.1 | If demand doubled next season, we could handle it. | (1) (2) (3) (4) (5) |
| 6.2 | I have a clear plan for the next thing we want to launch. | (1) (2) (3) (4) (5) |
| 6.3 | I know which few numbers tell me whether we're healthy. | (1) (2) (3) (4) (5) |
| 6.4 | I have room in my week to think about the future. | (1) (2) (3) (4) (5) |

AREA TOTAL / 20

Your six scores

Write each area total in the box, then shade the bar up to your score (each square is one point, from 4 to 20). Your shortest bar is where the real opportunity lives.

		4	12	17	20
01 Purpose & Direction					
02 The Leader's Load					
03 Roles & People					
04 Systems & Flow					
05 Culture & Communication					
06 Readiness to Grow					

17–20 · Rooted

A strength to build on. Protect what's working here.

12–16 · Growing

Some friction. Small, steady changes will pay off.

4–11 · Strained

This is where energy is leaking. Start here.

My lowest area is _____

My strongest area is _____

What surprised me: _____

If this is your lowest area...

Every business has a lowest area. Yours is not a verdict. It's a signpost pointing to the one change that will make the others easier.

01 Purpose & Direction

Your roots need tending. When purpose blurs, every decision gets heavier. Start by writing, in one sentence, why this business exists, then share it with your team and listen to what comes back.

02 The Leader's Load

You are carrying too much of it alone. List the decisions that land on your desk each week and choose one to hand off, with clear guidelines, this month.

03 Roles & People

Good people are working without a clear map. Pick one key role and write down what it owns, what success looks like, and who it answers to.

04 Systems & Flow

Friction is hiding in the handoffs. Choose the one process that goes wrong most often and document it step by step with the people who do it.

05 Culture & Communication

Things are going unsaid. Start a short weekly check-in with one simple question: what's getting in your way?

06 Readiness to Grow

Growth would stretch you thin right now. Block two protected hours this week just to think about the business, not in it.

Healing an enterprise rarely starts with a grand overhaul. It starts with one honest look, and one small change made with care.

Two questions to sit with

What is the one thing that, if it were fixed, would change everything?

What does a great month look like for you a year from now?

One small step I'll take in the next seven days:

YOUR NEXT STEP

You don't have to untangle it alone.

If your scores surprised you, or confirmed what you already felt, let's talk it through. In a free 15-minute conversation, we'll look at your lowest area together and name the first move that would give you room to breathe again.

Book your free 15-minute conversation
rootedvisionstudio.com/get-in-touch

Or simply reply to your welcome email. I read every note myself.

