

Catalyst milestone tracker



IMAGINE

- You have identified your **top 5 core values**
 - You have a **draft for your tagline** ("I help _____ do _____ so they can _____")
 - You identified the demographics of your **Ideal Patient Avatar** ("target") and their detailed characteristics, problems, symptoms, and pain points.
 - You have **visualized your ideal work setting** and begun to explore options
 - You have explored the **Catalyst Trello Template** to set up a virtual vision board
 - You signed your **personal proclamation**
 - OPTIONAL: You have a **Signature Talk** locked in and ready to go*
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FIND

- You identified your **preferred tech stack**
 - ATTRACT/NURTURE: Website, online scheduler, CRM (newsletter service)
 - OPERATIONS: Electronic Medical Records, Efficiency tools (Text expander, Boomerang, Tango)
 - You have edited and downloaded your **Disclaimers and Consent forms**
 - You have solidified your **communication preferences** to funnel contacts efficiently
 - You've completed your **personal User Manual** to understand your energy expenditure
 - You are aware of where your **boundaries** are leaky and you're consciously looking to recognize (and correct) them so you feel confident in protecting your energy
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STREAMLINE

- You have **begun SOP creation** to organize your operational systems
 - You have **solidified your Discovery Call and Onboarding** processes
 - You have **set up your social media profiles** (name, bio, hashtags)
 - You have **repurposed infographics for your own use** (patient education, lectures, videos, social media)
 - You keep a list and started working on **charting efficiencies and templates**
 - You have **filmed a few Loom videos** to increase efficiency of your systems
 - OPTIONAL: You created your **first mini-course** to sell as standalone*
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AMPLIFY

- You have started unrolling **Group Visits** (or set a deadline later in the calendar year to revisit this idea as your needs change)
 - You have **curated enough duties for a job description** to hire a Virtual Assistant (and continued expanding your SOP library)
 - You have developed a **tiered Membership Offering** and solidified your onboarding
 - You have **committed to a price structure** with list of value-driven benefits in each tier
 - You have started **posting consistently on Social Media** (using scheduling app)
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PARADE

- You have started **asking for Testimonials** (via Google form, Google review, or video)
- You've **explored affiliate relationships** to augment your reach
- You have an idea about **a fulfilling professional goal** you'd like to work towards (public speaking, podcast, book publishing, etc)
- You are considering **hosting an Expo or live event** (virtual or in-person)
- You have **developed a loyalty program** to help improve patient retention
- You're an expert at **prioritizing important decisions** using the Catalyst scoring calculator