WORKSHEET

REMOVING YOURSELF AS THE BOTTLENECK

by Kalika

© KALIKA LLC • @KALIKAYAP • KALIKA.COM

INTRO

Most founders don't realize how many places they're the chokepoint until they map it out.

This worksheet helps you find every spot where your business waits on you, and gives you a starting plan to build the scaffolding that runs without you.

Set aside 30 minutes, grab a cup of tea, and answer honestly.

The clearer you are here, the faster you'll get out of the bottleneck seat.

Part 1: Where are you the bottleneck right now?

1. List five things in your business that don't happen unless you do them.

a. _____

b. _____

c. _____

d. _____

e. _____

2. Which one of those five drains you the most?

_____

_____

3. If that one task ran itself for a year, what would you do with the extra time?

_____

_____

Part 2: Your Core Context

4. In one sentence, what does your business do?

_____

_____

5. Who is your ideal client or customer? Be specific.

_____

_____

6. What are your top three business goals for the next 90 days?

a. _____

b. _____

c. _____

7. What's your role inside your business? What do only you do?

Part 3: Your Voice and Style

8. List five words that describe how you want your writing to sound.

9. List five words or phrases you never want your AI to use when writing for you.

10. Do you prefer contractions or formal language? Long paragraphs or short? Bullet points or prose?

Part 4: Your Domain Knowledge

11. People. Who are your top five team members, clients, or contacts your AI should know by name?

12. Business. What are the three KPIs you track most often?

© KALIKA LLC • @KALIKAYAP • KALIKA.COM

13. Finance. What's one financial number your AI should always be aware of? (Monthly revenue target, quarterly budget, etc.)

14. Goals. What's your number-one goal for this quarter?

Part 5: Your First Automation

15. Of the five bottleneck tasks you listed in Part 1, which one is the most repetitive?

16. How long does it currently take you each week?

17. If you got that time back, what would you spend it on?

Part 6: Your Sub-agents

18. If you were going to hire three specialists to help you in your business, what would their roles be?

a. _____

b. _____

c. _____

19. Which one would have the biggest impact on your week if you set it up first?

Part 7: Your Integrations

20. List the top five tools you use every week (Google Workspace, QuickBooks, Notion, etc.).

21. Which two tools, if connected to your AI, would save you the most time?

Part 8: Your Safety Net

22. What actions should your AI never take without your explicit approval? For example: sending emails, posting on social, making purchases, deleting files.

CLOSING

Look back at what you wrote, especially Part 1. Every line on that list is a spot where your business is waiting on you.

That's the bottleneck made visible. Now pick one of those five and start there.

Write the instruction file. Build the automation. Set up the sub-agent. You don't have to fix all five at once. Fixing one is enough to feel the difference.

And remember what Ashkaan said. Getting to Level 2 takes an afternoon.

You can do this.