



Push vs Pull Diagnostic Worksheet

A Founder's Self-Audit for Revenue System Clarity

■ Step 1: Identify Your Current Mode

Evaluate where your current client flow originates — from deliberate Push or random Pull.

Question	Push (You drive demand)	Pull (Market drives demand)	Your Score (1–5)
How do most clients find you?	Outreach, partnerships, ads	Referrals, inbound leads	
Who decides scope & pricing?	You have fixed offers	Clients dictate requirements	
How predictable is next sale?	Forecasted through pipeline	Luck-based	
Do you run regular campaigns?	Yes	No	
Do you turn away leads?	Yes, based on fit	No, take all	

➡ ■ Scoring Guide:

- 1–2 → Reactive Pull Mode (busy but unfocused)
- 3 → Hybrid Chaos (transitioning)
- 4–5 → Proactive Push Mode (system working)

■ Step 2: The 3R Filter Self-Test

Factor	Guiding Question	Your Score (1–5)
Revenue	Does this improve recurring income or open long-term opportunity?	
Relevance	Does it align with my niche and brand?	
Replicability	Can it be repeated or delegated?	

- If total < 10 → Decline or outsource
- 10–13 → Test via intern or partner
- 14+ → Systemize into offer

■ Step 3: Evaluate Your Push Engine

Area	Diagnostic Question	Action Plan
Visibility	Do I post content that shows niche authority?	Define 2–3 content themes.

Trust	Do potential clients see proof of results?	Create 1 new story/testimonial per client.
Conversion	Do I have a clear sales flow?	Add a discovery call or checkout link.
Automation	Do I use AI tools for leads?	Automate onboarding and follow-ups.
Review	Do I track weekly metrics?	Use Notion or Excel dashboard.

■ Step 4: Identify Your Phase

Phase	Description	Next Step
Reactive Puller	Clients come to you but you're overworked	Build filters and clear offers.
System Builder	You're stabilizing delivery but inconsistent	Start your Push Engine and document processes.
Scalable Founder	Push + Pull working together	Automate, delegate, and scale repeatably.

■ Reflection

“Am I building a business that works only when I do — or a system that runs even when I’m away?”

Notes:
