



## 30-Day Onboarding Checklist

A step-by-step guide to navigating the KPIXAI platform, building your business model, and unlocking your **Business Growth Readiness Score™**.

**Platform Access:** [myKPIXAI.com](http://myKPIXAI.com)

**Built for:** Small Business Owners • Founders • CEOs

**Powered by:** Integrality, LLC

Start your free 30-day trial at [www.KPIXAI.com](http://www.KPIXAI.com)

## How to Use This Checklist

This checklist is designed to guide you through the exact sequence needed to fully set up your KPIXAI account, complete each strategic module, and generate your **Business Growth Readiness Score™**. Complete each step in order for best results.

- 1 Log into the platform at [myKPIXAI.com](http://myKPIXAI.com) using the username and password sent to your email.
- 2 Follow the checklist sequentially—each module builds on the previous one.
- 3 Enter accurate, real-time information about your business to ensure reliable insights.
- 4 Do not skip modules; full completion is required to generate your readiness score.
- 5 Use the final insights to build a focused 90-day execution plan.

## Week 1: Platform Setup & Business Foundation

- 1 ■ Log into the platform at [myKPIXAI.com](http://myKPIXAI.com) using the username and password you received via email
- 2 ■ Complete the **Set Up** module by entering your business profile information
- 3 ■ Add your **hero products and/or services** to establish revenue focus
- 4 ■ Invite your **business advisor, CPA, or financial partner** to collaborate (optional but recommended)
- 5 ■ Add internal **team member(s)** who support strategy, finance, or operations
- 6 ■ Schedule two 45-minute strategy sessions on your calendar for focused work
- 7 ■ Proceed to the **Unique Value Proposition (UVP)** module and complete all segments
- 8 ■ Use the UVP module to prepare for building your business model

## Week 2: Revenue & KPIs

- 1 ■ Complete the Sales Strategy module
- 2 ■ Identify core revenue streams and pricing focus
- 3 ■ Complete the KPI Dashboard module
- 4 ■ Select KPIs tied to revenue, growth, and operations
- 5 ■ Identify leading vs. lagging indicators

## Week 3: Operations & Financial Readiness

- 1 ■ Complete the Process & Operations module
- 2 ■ Identify bottlenecks and resource gaps
- 3 ■ Review systems, workflows, and team capacity
- 4 ■ Complete Projections & Financial Overview modules
- 5 ■ Assess profitability, cash flow, and financial risk

## Week 4: Readiness Score & Action Plan

- 1 ■ Review and validate all completed modules
- 2 ■ Unlock your Business Growth Readiness Score™
- 3 ■ Review strengths, gaps, and risk areas
- 4 ■ Identify top 3 growth constraints
- 5 ■ Build a 90-day execution plan with KPIs and review cadence

**Start Now:** Visit [www.KPIXAI.com](http://www.KPIXAI.com)

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