The Mid-Year Check-In Audit

A candid, low-pressure check-in for solo business owners. First, some context, so you know you're not alone.

YOU'RE PART OF A GROWING MOVEMENT

30M
solopreneurs now operate in the US.

2 in 3
say going solo met or exceeded expectations.

78%
expect this year to beat the last.

THE HARD PART OF STAYING SOLO

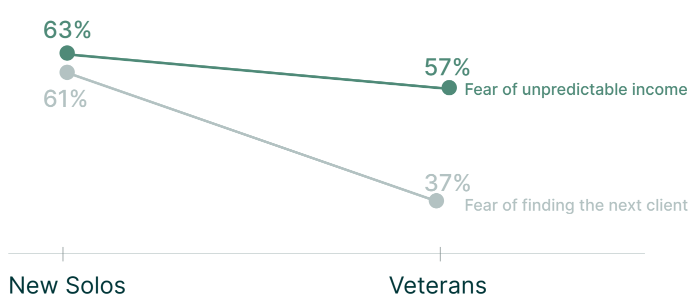
- 95% carry real anxiety about the business.
- Income unpredictability is the top worry, and it barely fades: 63% of new solos, still 57% of veterans.
- 51% say client acquisition is their biggest challenge.
- 3 in 4 wrestle with pricing.

WHAT THE THRIVING SOLOS DO

- 74% run "polywork," several paid engagements at once.
- 75% grow through networking, the #1 strategy.
- Six-figure solos are 2x as likely to have an S corp (48% vs 22%).
- 67% aren't confident in their tax advice, a gap worth closing.

The worry that doesn't fade

As solos gain experience, the fear of finding clients drops sharply. The fear of unpredictable income barely moves.



Source: Lettuce, The Solopreneur Perspective (206). Survey of 603 solopreneurs.

THE WORKSHEET · PART 1

Zoom out: the check-in questions

Sit down with a cup of coffee, grab a pen, and answer honestly. You do not need all of them, just the ones that land.

1. Is your one-word theme still right?

Pick a single word to define each year (one year it was “opportunity creation,” the next “opportunity balance”). Does your word still fit, or does the second half need a new one?

2. Are you overdependent on one client?

Three in four solos run “polywork,” several paid engagements at once. If one client left tomorrow, what happens to your year?

3. Is your fall pipeline full past August?

Summer is the quiet season, which makes it the time to reconnect. Who could you reach out to this month? Networking is the #1 growth move solos name (75%).

4. Do your pricing and offer still fit?

Three in four solos wrestle with pricing. Do your rates and positioning still match the clients you want more of?

5. What did you say yes to that you’d decline now?

And what did you say no to that, in hindsight, would have been a good fit? This is opportunity balance in practice.

THE WORKSHEET · PART 2

The moves worth making

You do not have to act on everything. Check one or two to carry into the second half.

- [ ] **Reconnect and fill the fall pipeline.**
  Block a little time each week this summer for outreach. Coffees now become booked work in the fall.
- [ ] **Harvest your first-half wins.**
  Ask for the testimonial or case study while the work is fresh and the client is still glowing.
- [ ] **Fix the one system that's costing you.**
  The bookkeeping you're behind on, the invoicing you chase by hand. Time management is a top challenge for 38% of solos.
- [ ] **Build one channel and keep it up.**
  A conference, a social cadence, a monthly note to past clients. One channel you sustain beats five you drop.
- [ ] **Protect your zone of genius, offload the rest.**
  Hand off the work that drains you, taxes and structure included, ideally before you feel ready.

THE WORKSHEET · PART 3

Commit to one move

The one move I'm committing to for the second half:

I'll put it on the calendar by:

The first small step is: