Greatness Lab

Practice To Platform Scorecard

Evaluate your current platform across 9 critical areas

Most Advisors Wait Until Something Breaks

They stay with an IMO until a payout dispute, a compliance headache, or a missed growth opportunity forces them to reconsider. By then, years have passed.

This scorecard helps you evaluate your current situation before frustration builds. Ten minutes of honest assessment can clarify whether your platform is supporting your growth or quietly holding you back.

10 Minutes to Clarity

Work through each of the nine categories on the following page. Score each statement from 1 to 5 based on how well it describes your current experience.

There are no trick questions. The purpose is not to sell you anything. The purpose is to give you a clear picture of where you stand.

How to Score Each Category

1	Not at all. This does not describe my experience.
2	Rarely. This happens occasionally but is not consistent.
3	Sometimes. This is true in some areas but not others.
4	Mostly. This describes my experience with few exceptions.
5	Completely. This is consistently true in my current situation.

The Scorecard

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Score each statement from 1 to 5. Circle the number that best describes your current experience.

#	Statement	Score				
1	I know exactly what I earn on every product and can verify it against my contract at any time.	1	2	3	4	5
2	I have access to the carriers and products I need without restrictions that limit my recommendations.	1	2	3	4	5
3	I operate my practice the way I choose, without approval processes that slow me down or override my judgment.	1	2	3	4	5
4	My back office support handles administrative work efficiently so I can focus on clients and growth.	1	2	3	4	5
5	I receive coaching, resources, and support specifically designed to help me grow my business.	1	2	3	4	5
6	My platform helps me build a practice that could operate without me and would be attractive to a buyer.	1	2	3	4	5
7	I am part of a community where advisors share ideas and help each other succeed rather than compete.	1	2	3	4	5
8	I have a clear succession plan and know what my practice would be worth if I decided to sell.	1	2	3	4	5
9	I participate in the growth and value creation of my platform beyond just my own production.	1	2	3	4	5

Your Total: 0 / 45

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Interpreting Your Total

36 - 45	Strong position. Your platform appears to support your business well. Any gaps are specific and manageable.
25 - 35	Adequate but limited. Your platform meets basic needs but may not be positioned to support your next stage of growth.
15 - 24	Significant limitations. Multiple areas are not serving you well. The cumulative effect may be costing you more than you realize.
Below 15	Your platform is likely holding you back. A serious evaluation of alternatives is warranted.

Where You Scored 3 or Below

The areas where you scored lowest represent your biggest gaps. Use the space below to identify them and consider what they may be costing you.

#	Gap Area	What This May Be Costing You

Three Questions Before You Do Anything

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1. Am I where I want to be?

Your total score gives you a baseline. But the more important question is whether your current trajectory will get you where you want to go. A score of 30 might be acceptable if you are three years from retirement. It might be a serious problem if you are trying to build a practice you can sell in ten years.

2. What is the cost of staying?

Look at the gaps you identified. Some are inconveniences. Others have real financial impact. Missing compensation, limited carrier access, lack of growth support, or unclear exit planning can cost hundreds of thousands over a career. What are your gaps actually costing you?

3. What would I need to see to consider a move?

If your score revealed significant gaps, what would a better alternative need to offer? Not promises or marketing claims, but demonstrated capabilities and a model that addresses your specific limitations.

Who Built Greatness Lab and Why

Jason and Allyson Mickool built Florida Financial Advisors from two people to more than 700 advisors across six regional brands in eight years. That track record was valuable enough for AmeriLife to acquire 60 percent of the business.

Now they are building Greatness Lab for a different purpose: to create a platform where advisors participate in value creation from day one. The mutual growth stakes model means advisors maintain 100 percent ownership of their practices while gaining equity in the platform itself.

This scorecard exists because most advisors do not have a clear picture of where they stand. Greatness Lab was built for advisors who want that clarity and are ready to act on it.

If You Want to Talk

If your score revealed gaps worth addressing, a conversation costs nothing and commits you to nothing. Jason speaks directly with advisors considering the platform.

Schedule a conversation: Schedule a conversation →
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