

# Scale Planning Worksheet

Use this worksheet to evaluate whether your business is prepared for its next stage of growth. Identify what is working, where your current systems may become strained, and what you need to strengthen before taking on significantly more customers, revenue, or activity.

The goal is not to scale as quickly as possible. The goal is to build the capacity needed to grow without allowing costs, complexity, or founder workload to get out of control.

## 1. Your Business Today

Describe your business as it operates today.

**What products or services generate most of your revenue?**

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**Who are your primary customers?**

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**What parts of the business are working especially well?**

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**What parts currently require the most time or attention?**

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**What would change if your customer base doubled?**

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## 2. Next Stage of Growth

Define what the next stage of growth looks like for your business.

**What revenue level are you working toward?**

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**How many customers would you like to serve?**

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**What products or services do you expect to grow?**

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What timeframe are you targeting?

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What would success look like at the end of this stage?

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### 3. Processes That Need to Scale

Identify the recurring activities that could become difficult as the business grows.

**Customer onboarding**

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**Sales**

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**Customer support**

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**Fulfillment or service delivery**

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**Billing and payments**

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**Marketing**

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**Hiring and training**

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**Reporting and administration**

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For each area, ask: Could this process handle significantly more activity without creating major problems?

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### 4. Founder Dependence

Identify the parts of the business that still depend heavily on you.

**What decisions can only you currently make?**

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**What tasks would stop if you were unavailable?**

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**What knowledge exists primarily in your head?**

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**What responsibilities could eventually be delegated?**

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**What should be documented first?**

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## **5. Team & Hiring**

Consider the people and capabilities you will need to support your next stage.

**What responsibilities will increase as you grow?**

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**Where does the business currently lack capacity?**

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**Which roles may need to be added?**

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**Which responsibilities could be reassigned or delegated?**

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**What should a new employee be able to accomplish within their first 90 days?**

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## 6. Technology & Automation

Identify repetitive work that could be simplified, automated, or supported by better technology.

**What tasks are currently performed manually?**

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**What work is repeated every day or week?**

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**Where are errors or delays occurring?**

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**What tools could improve efficiency?**

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**Which technology investment would have the greatest impact?**

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## 7. Financial Capacity

Growth requires financial capacity as well as operational capacity.

**What will your next stage of growth cost?**

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**Which expenses will increase as you grow?**

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**Can your current cash flow support those costs?**

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**How much additional working capital may be required?**

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**What financial risks could slow or disrupt your growth?**

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## 8. Protecting Quality

Think about what makes your business valuable to customers today.

**What should never be compromised as you grow?**

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What quality standards must remain consistent?

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Where could faster growth create customer problems?

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How will you monitor customer satisfaction?

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What processes can help maintain consistency?

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## 9. Your Biggest Scaling Bottleneck

Identify the single biggest issue that could prevent your business from handling its next stage of growth.

**My biggest scaling bottleneck is:**

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**Why it could become a problem:**

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**What I can do about it:**

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## 10. Scale Your Priorities

Choose the three areas that deserve the most attention before you scale.

**Priority #1:**

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**Specific action for Priority #1 during the next 30–90 days:**

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**Priority #2:**

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**Specific action for Priority #2 during the next 30–90 days:**

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**Priority #3:**

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**Specific action for Priority #3 during the next 30–90 days:**

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## Final Checklist

- I understand what the next stage of growth looks like.
- I know which processes will be most affected by increased demand.
- I have identified areas where the business depends too heavily on me.
- I understand the people and skills I will need.
- I have identified opportunities for automation or better technology.
- I understand the financial requirements of growth.
- I have a plan for protecting quality as the business grows.
- I know my biggest scaling bottleneck.
- I have identified my three highest-priority improvements.
- I have specific actions planned for the next 30–90 days.

## What to Do Next

Scaling works best when the business is prepared for the pressure that growth creates.

Use what you identified in this worksheet to strengthen your systems, processes, team, technology, and financial foundation before taking on significantly more activity.

You do not need to fix everything at once. Start with the bottleneck most likely to limit your next stage of growth, improve it, and then move to the next priority.

The goal is to build a business that can grow without breaking what already works.