

BUSINESS SCALING TEMPLATE

A STRATEGIC PLANNING WORKBOOK FOR GROWTH-READY BUSINESSES

COMPANY NAME:

COMPLETED BY:

DATE:

CURRENT ANNUAL REVENUE:

TARGET ANNUAL REVENUE:

WHAT'S INSIDE THIS TEMPLATE?

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| 1. BUSINESS SNAPSHOT: | Assess where you are today. |
| 2. BOTTLENECK IDENTIFIER: | Find what's limiting your growth. |
| 3. SCALING READINESS SCORECARD: | Determine if you're ready to scale. |
| 4. 90-DAY SCALING ROADMAP: | Plan your immediate priorities. |
| 5. WEEKLY METRICS DASHBOARD: | Track what matters. |



1. BUSINESS SNAPSHOT

BEFORE YOU CAN SCALE, YOU NEED A CLEAR PICTURE OF WHERE YOU STAND TODAY.

REVENUE & PROFITABILITY

Metric	12 Months Ago	6 Months Ago	Current
Monthly Revenue			
Monthly Profit			
Profit Margin %			
Recurring Revenue %			

REVENUE & PROFITABILITY

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Monthly Revenue			
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Profit Margin %			
Recurring Revenue %			

SYSTEMS & PROCESSES

Check all that apply

- ☐ We have documented processes for our core operations
- ☐ New team members can be trained without founder involvement
- ☐ Our CRM/project management systems are consistently used
- ☐ We have clear metrics we review regularly
- ☐ Customer onboarding runs without owner involvement
- ☐ Financial reporting happens monthly (at minimum)
- ☐ We have 3+ months cash runway at current burn rate



2. BOTTLENECK IDENTIFIER

Every business has a primary constraint. Find yours to know where to focus.

Rate each statement from 1 (strongly disagree) to 5 (strongly agree)

PEOPLE CONSTRAINTS

We turn down work because we don't have enough people	1 2 3 4 5
Key team members are burned out or at capacity	1 2 3 4 5
The owner/founder is the bottleneck for decisions	1 2 3 4 5
We struggle to find qualified candidates when hiring	1 2 3 4 5

PEOPLE SCORE:_____/20

PROCESS CONSTRAINTS

We reinvent the wheel for tasks we've done before	1 2 3 4 5
Quality is inconsistent depending on who does the work	1 2 3 4 5
We lose time to miscommunication or unclear handoffs	1 2 3 4 5
Manual tasks eat up time that could be automated	1 2 3 4 5

PROCESS SCORE:_____/20

PROCESS CONSTRAINTS

We turn down work because we don't have enough people	1 2 3 4 5
Key team members are burned out or at capacity	1 2 3 4 5
The owner/founder is the bottleneck for decisions	1 2 3 4 5
We struggle to find qualified candidates when hiring	1 2 3 4 5

PROCESS SCORE:_____/20

YOUR PRIMARY BOTTLENECK

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3. SCALING READINESS SCORECARD

NOT EVERY BUSINESS IS READY TO SCALE. THIS SCORECARD HELPS YOU ASSESS YOUR FOUNDATION.

SCORE EACH AREA: 1 = NOT IN PLACE | 2 = PARTIALLY | 3 = MOSTLY | 4 = FULLY ESTABLISHED

Readiness Factor	Score (1/4)	Notes/Evidence
Proven, repeatable sales process		
Consistent delivery/fulfillment quality		
Documented standard operating procedures		
Financial reporting & cash visibility		
Leadership team beyond founder		
Customer retention above 70%		
Clear target customer profile		
Technology/systems that scale		
Defined company values & culture		
Owner works ON business, not just IN it		

TOTAL READINESS SCORE: _____ / 40

SCORE INTERPRETATION

Score	Status	Recommended Action
10-19	Foundation Building	Focus on stabilizing current operations before scaling
20-29	Getting Ready	Address gaps in lowest-scoring areas first
30-35	Scale Ready	Begin planning 90-day scaling initiatives
36-40	Growth Mode	Execute scaling plan with confidence



4. 90-DAY SCALING ROADMAP

BREAK YOUR SCALING GOALS INTO ACTIONABLE 30-DAY SPRINTS.

90-DAY SCALING GOAL

What specific, measurable outcome will you achieve in 90 days?

Days 1-30: Foundation

Priority Action	Owner	Due Date	Done

Days 31-60: Build

Priority Action	Owner	Due Date	Done

Days 61-90: Accelerate

Priority Action	Owner	Due Date	Done



5. WEEKLY METRICS DASHBOARD

TRACK THE NUMBERS THAT MATTER. REVIEW THESE EVERY WEEK.

Define Your Key Metrics

Choose 5-7 metrics that directly indicate business health and growth.

Metric Name	Owner	Due Date	Done

Weekly Tracking Grid

Metric Name	Owner	Due Date	Done

Common Metrics to Consider

- Leading Indicators:** Leads generated, proposals sent, sales calls booked, website traffic
- Lagging Indicators:** Revenue, profit margin, customer count, churn rate, average order value
- Operational:** On-time delivery rate, customer satisfaction score, employee utilization



ACTION SUMMARY

CAPTURE YOUR KEY INSIGHTS AND NEXT STEPS IN ONE PLACE.

Key Findings

Choose 5-7 metrics that directly indicate business health and growth.

From my Business Snapshot, my biggest insight is:

My primary bottleneck is:

My Scaling Readiness Score is _____ and this means:

Immediate Next Steps

Action	By When

Need help executing your scaling plan?
A Fractional COO can help you implement systems, build your team,
and accelerate growth without the cost of a full-time executive.

ScaleUpExec.com

Fractional COO Services for Growing Businesses