Scaling Readiness Checklist

Growth exposes whatever is held together by effort. Check these five areas before you add volume, markets, or headcount.

How to use it

Tick only what is true today and could be demonstrated to a new team member. Count the ticks per area.

1. PROCESS

- [ ] Core workflows are written down and followed
- [ ] Hand-offs between teams have a named owner
- [ ] Exceptions are logged, not solved from memory
- [ ] A new hire could run the process from the documentation

2. SYSTEMS

- [ ] One source of truth for customers and revenue
- [ ] Manual re-keying between tools is the exception
- [ ] Systems handle 3x current volume without rework
- [ ] Access and permissions are reviewed regularly

3. PEOPLE & ORGANISATION

- [ ] Roles and decision rights are clear at every level
- [ ] No single person is a point of failure for a critical task
- [ ] Managers can run their area without founder input
- [ ] Hiring and onboarding follow a repeatable plan

4. CUSTOMER DELIVERY

- [ ] Delivery quality does not depend on who is assigned
- [ ] Support and implementation capacity is planned ahead of sales
- [ ] Margins are known by customer segment
- [ ] Customer feedback reaches the people who can act on it

5. GOVERNANCE & METRICS

- [ ] Five or fewer operating metrics reviewed on a fixed cadence
- [ ] Targets are tied to owners, not to the whole team
- [ ] Risks and dependencies are tracked and reviewed
- [ ] Investment decisions use current data, not last year's plan

Scoring

Ticks in an area (of 4)	Rating	What it means
0–1	Fragile	Fix before scaling. Growth will amplify the problem.
2–3	Workable	Scale carefully, with a named plan to close the remaining gaps.
4	Ready	This area will support the next stage of growth.

> **Rule of thumb:** scale at the pace of your weakest area. A single fragile area (usually delivery or systems) will cap growth no matter how strong the others are.

Turning gaps into a plan

Area with a gap	Smallest change that removes the risk	Owner	Due

Planning to scale into a new market or customer segment?
Book a Market Expansion discovery call →