

## **Why This Matters:**

Scaling too soon can break what you've worked so hard to build. This checklist is designed to help you pause, reflect, and ensure you have the foundation in place to scale sustainably.

## **Who It's For:**

Early-stage founders

Startup teams approaching product-market fit

Pre-Series A companies

Solo operators preparing to hire and grow

## **How to Use This Checklist:**

Use honest self-assessment (yes/no or rate 1–5)

Print it out or check digitally

Review with your leadership team

Add notes where needed

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# > Startup Scaling Readiness

## CHECKLISTS

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### Instructions:

Rate each item on a scale of 1–5. A scorecard is a tool used to track and measure performance. It's important to help identify areas that need improvement, set targets and communicate progress to stakeholders. Scorecards are graded on a rating scale of 1-5. 5 is the highest achievement and the expected performance at the level of the rubric. 1 is the lowest performing indicator:

**(5)** = Excellent **(4)** = Very Good **(3)** = Good **(2)** = Insufficient **(1)** = Not Achieved

<b>(5) Excellent</b>	<b>(4) Very Good</b>	<b>(3) Good</b>	<b>(2) Insufficient</b>	<b>(1) Not Achieved</b>
The task was successfully introduced to the team and completed. The method was integrated seamlessly. Or, the finished product works perfectly	The task was introduced however, minor issues still need to be resolved over time. There are areas that still need improvement	The task was introduced however, a knowledge gap, resources, or an unfinished MVP needs more work	The task was introduced, we're still searching for best practices and strategies for moving forward.	The task was not introduced and still left incomplete. Or, we have yet to get started on this task.

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### OPERATIONS

- ☐ We have repeatable, documented processes for core functions **SCORE:** \_\_\_\_
  - ☐ Our internal tools are integrated and reduce manual work **SCORE:** \_\_\_\_
  - ☐ We can onboard a new team member without major disruption **SCORE:** \_\_\_\_
  - ☐ KPIs are tracked and reviewed regularly **SCORE:** \_\_\_\_
  - ☐ We have systems that could handle 2x–3x the current load **SCORE:** \_\_\_\_
-

### CUSTOMER EXPERIENCE (CX) & RETENTION

- ☐ Our onboarding process is smooth and measurable **SCORE:** \_\_\_\_
- ☐ We track customer satisfaction or NPS regularly **SCORE:** \_\_\_\_
- ☐ Our support process is documented and scalable **SCORE:** \_\_\_\_
- ☐ We understand our most valuable customer segments **SCORE:** \_\_\_\_
- ☐ We have a retention strategy in place **SCORE:** \_\_\_\_

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### TEAM READINESS

- ☐ Key roles are filled with clear responsibilities **SCORE:** \_\_\_\_
- ☐ Our team communicates effectively, even remotely **SCORE:** \_\_\_\_
- ☐ We have systems for hiring, onboarding, and managing people **SCORE:** \_\_\_\_
- ☐ We've documented our values or company culture principles **SCORE:** \_\_\_\_
- ☐ Leadership is aligned on vision and scale goals **SCORE:** \_\_\_\_

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### FINANCIAL SYSTEMS

- ☐ We have a clear view of our runway and burn rate **SCORE:** \_\_\_\_
- ☐ Forecasting is updated regularly **SCORE:** \_\_\_\_
- ☐ Budgets are tied to company goals **SCORE:** \_\_\_\_
- ☐ We know our unit economics (CAC, LTV, etc.) **SCORE:** \_\_\_\_
- ☐ We've planned financially for growth investments (tools, team, etc.) **SCORE:** \_\_\_\_

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### PRODUCT / MARKET FIT

- ☐ We've identified a clear, validated problem our product solves **SCORE:** \_\_\_\_
- ☐ Customers use our product consistently **SCORE:** \_\_\_\_
- ☐ Our churn rate is low and improving **SCORE:** \_\_\_\_
- ☐ We receive unsolicited praise or referrals **SCORE:** \_\_\_\_
- ☐ There's clear demand we're struggling to keep up with **SCORE:** \_\_\_\_

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## Your Scaling Readiness Score

*Tally your scores across all 25 items (Max: 125 points)*

- **100–125** → You're scaling-ready! Build your roadmap and go.
- **75–99** → Almost there—tighten a few areas before you hit go.
- **50–74** → Caution: strengthen your foundation first.
- **<50** → Red flag: prioritize foundational work to avoid a messy scale.

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## What's Next?

If you scored under 100, don't stress. Most startups do. The key is knowing where the gaps are.

## Need a second set of eyes?

👉 [Book a Scaling Readiness Session]

Contact page

## Let's Talk:

🌐 <https://www.shavaughnb.com/contact>

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