

\$100M SCALING ROADMAP

► STAGE 6: OPTIMIZE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 6: OPTIMIZE



5: PRODUCTIZE				6: OPTIMIZE				7: CATEGORIZE			
HEADCOUNT	10 to 19	HEADCOUNT	20 to 49	LEADERSHIP STRUCTURE	2 Layers: Full Team of Managers	LEADERSHIP STRUCTURE	3 Layers: Full Team of Managers	CONSTRAINT	TO GRADUATE	CONSTRAINT	TO GRADUATE
YOUR ROLE	Director	YOUR ROLE	Leader	# OF COMPANIES HERE	15	# OF COMPANIES HERE	2,100,000	CONSTRAINT	TO GRADUATE	CONSTRAINT	TO GRADUATE
PRODUCT	Customers have nothing else to buy from you & churn.	PRODUCT	Improving two products slows down improvements.	CONSTRAINT	Install incremental product improvement process for both products.	CONSTRAINT	Fix one problem at a time with focused feature specific focus.	TO GRADUATE	Implement Ad assembly process & segmented LT movements take too long to roll out.	TO GRADUATE	Find first customers with referral process (e.g. leads A) & segmented LT moves by lead source. Pick next similar platform & repeat case 4.
MARKETING	Spiraling costs too expensive and use your ability to advertise.	MARKETING	Ads don't convert as well to colder traffic. CAC goes up.	CONSTRAINT	Implement Ad assembly process to increase volume.	CONSTRAINT	Only have one way to get customers.	TO GRADUATE	Better schedule coverage. Create lead nurturing checklist & kudos for top cadence. Not worked consistently.	TO GRADUATE	Create proactive customer profile & communication. Focus on renewals and extensions.
SALES	Qualified leads are too expensive and use your ability to advertise.	SALES	Closing efficiency on core product drops. Becomes inconsistent. Refunds go down but so do closes.	CONSTRAINT	Install sales training system, individual coaching, and team cadence.	CONSTRAINT	All firefighting.	TO GRADUATE	Network technology. Bring solutions to the cloud where it's available. Locate hardware if on-prem.	TO GRADUATE	Setup HRIS - Human Resources Information System.
CUSTOMER SERVICE	Customers come in with unrealistic expectations, def. inconveniences.	CUSTOMER SERVICE	Churn increases due to volume & new product.	CONSTRAINT	Create customer segmentation by cohort and activation points.	CONSTRAINT	Over the phone and disconnected people and they get met elsewhere. You need to know who disconnected and where they're going to provide better support.	TO GRADUATE	Install Applicant Tracking System to keep track of so many open roles. Pay specialized recruiting firms to keep up.	TO GRADUATE	OTL expense management. Budgets by dept. Cards w/ limits. Expense approval process. Add insurance coverage & get fancier projections.
INFORMATION TECH (IT)	Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business.	INFORMATION TECH (IT)	New people coming in. Old people leaving with IP, data, and access.	CONSTRAINT	Cyber security. Malware. Password protection from and for employees. Onboarding and offboarding employees.	CONSTRAINT	No one knows who employee information and you have no backup.	TO GRADUATE	The business is disorganized.	TO GRADUATE	Triage appropriately.
RECRUITING	Have trouble finding higher level sales managers.	RECRUITING	The number and type of roles you need exceed your current network. (Everyone who's good has a job already.)	CONSTRAINT	You learn to headhunt higher level roles. Add multiple interviews filtering for different skills.	CONSTRAINT	Spending your money stupidly.	TO GRADUATE		TO GRADUATE	
HUMAN RESOURCES (HR)	You're firing people incorrectly and exposed.	HUMAN RESOURCES (HR)	You can't get higher level talent because they expect full compensation package (benefits, retirement, etc.)	CONSTRAINT	Setup benefits, retirement, and advanced compensation plans.	CONSTRAINT		TO GRADUATE		TO GRADUATE	
FINANCE	You don't know how much money you can reinvest into growth.	FINANCE	You're spending money to grow, but you're not. Money is missing. Where's my return?	CONSTRAINT	Scale up AR/AP. Get more granular financial data. Balance sheet. Begin making quarterly tax payments.	CONSTRAINT		TO GRADUATE		TO GRADUATE	
Bottom line	Not making enough per customer. Low LTV/CAC.	Bottom line	Everything is inefficient.	CONSTRAINT	Grow by doing everything better rather than more.	CONSTRAINT		TO GRADUATE		TO GRADUATE	

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 6: OPTIMIZE

HEADCOUNT	20 to 49	
YOUR ROLE	Leader	
LEADERSHIP STRUCTURE	2 Layers: Full Team of Managers	
# OF COMPANIES HERE	2,100,000	
CONSTRAINT		
PRODUCT	Improving two products slows down improvements.	Install incremental product improvement process for both products.
MARKETING	Ads don't convert as well to colder traffic. CAC goes up.	Implement Ad assembly process to increase volume.
SALES	Closing efficiency on core product drops. Becomes inconsistent. Refunds go down but so do closes.	Install sales training system, individual coaching, and team cadence.
CUSTOMER SERVICE	Churn increases due to volume & new product.	Create customer segmentation by cohort and activation points.
INFORMATION TECH (IT)	New people coming in. Old people leaving with IP, data, and access.	Cyber security. Malware. Password protection from and for employees. Onboarding and offboarding employees.
RECRUITING	The number and type of roles you need exceed your current network. (Everyone who's good has a job already.)	You learn to headhunt higher level roles. Add multiple interviews filtering for different skills.
HUMAN RESOURCES (HR)	You can't get higher level talent because they expect full compensation package (benefits, retirement, etc)	Setup benefits, retirement, and advanced compensation plans
FINANCE	You're spending money to grow, but you're not. Money is missing. Where's my return?	Scale up AR/AP. Get more granular financial data. Balance sheet. Begin making quarterly tax payments.
Bottom line	Everything is inefficient.	Grow by doing everything better rather than more.

WATCH THIS FIRST

"START HERE"



THIS VIDEO EXPLAINS THE ENTIRE
\$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences
between stages



Repeat themes
to be aware of



How to get the most
out of your business



**GOT IT? LET'S
START SCALING**

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 6**



YOUR ROLE

Leader



HEADCOUNT

20-49



BOTTOM LINE

Everything is inefficient



GRADUATE BY

Doing better rather than doing more

WHEN YOU HIT “STAGE 6: OPTIMIZE”

You've grown to 20-49 employees! About 2.1 million businesses reach this level. You're now a “Leader” with a full team of managers under you. The interesting thing about this stage? Your main challenge isn't doing more—it's doing everything better. You have two products, but they both need improvement.

THE BIG CHALLENGE: EVERYTHING COULD BE BETTER

The biggest problem at Stage 6 is that having more people doesn't automatically make things work better. Things are actually getting less efficient. That's why it's called the “Optimize” stage—you need to make everything work better, not just bigger. Let's look at what's happening...

Products and Marketing

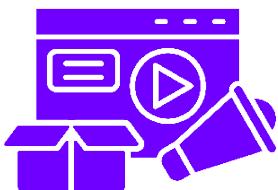
Sales and Customer Service

Tech and Security

People and HR

Money Matters





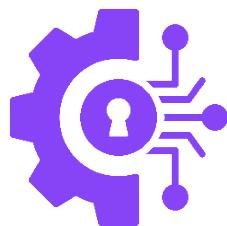
Products and Marketing

- Improving two products at once is slowing everything down
- You need a process to improve both products bit by bit
- Your ads don't work as well with colder audiences
- Your marketing costs (CAC) are going up
- You need a better way to create ads at scale



Sales and Customer Service

- Your core product isn't closing as well as it used to
- Sales team needs real training now
- Customer churn is increasing because you have more products
- You need to group customers by when they joined and how they use products
- You need to track more detailed customer success metrics



Tech and Security

- New people are joining, others are leaving
- Company data and access is at risk
- You need real cybersecurity
- You need better password protection
- You need proper employee onboarding and offboarding for tech



People and HR

- You can't find enough good people through your network
- Everyone who's good already has a job
- You need multiple interviews for different skills
- High-level talent wants full benefits packages
- You need retirement plans and better benefits

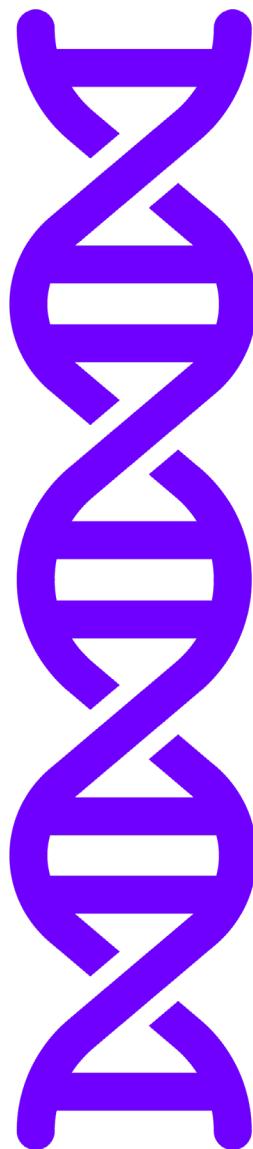


Money Matters

- You're spending money on growth but not growing
- Money seems to be missing or wasted
- You need more detailed financial data
- You need a real balance sheet
- You need to pay taxes quarterly

WHAT SUCCESS LOOKS LIKE AT STAGE 6

YOUR JOB IS TO MAKE EVERYTHING WORK BETTER.
HERE'S WHAT YOU NEED TO DO:



THE BOTTOM LINE

STAGE 6 IS ABOUT MAKING EVERYTHING WORK BETTER, NOT JUST BIGGER. INSTEAD OF JUST ADDING MORE PEOPLE OR DOING MORE THINGS, YOU NEED TO:



IMPROVE EXISTING SYSTEMS



MAKE THINGS MORE EFFICIENT



FIX WHAT'S BROKEN



BUILD BETTER PROCESSES

WHY IT'S CHALLENGING:

- It's tempting to just do more instead of better
- Fixing things takes time and money
- You have to change how things work
- People resist change
- You have to invest in improvement without immediate payoff

BUT IT'S WORTH IT BECAUSE:

- Things start working smoothly
- You waste less money
- People are more productive
- You can grow without breaking things

REMEMBER

The key to Stage 6 is patience. Making things better takes time. You can't rush optimization. You have to:

- Find what's not working well
- Figure out why
- Create a better way
- Test it
- Train people
- Monitor results

About 2.1 million businesses have mastered this optimization phase. The successful ones usually:

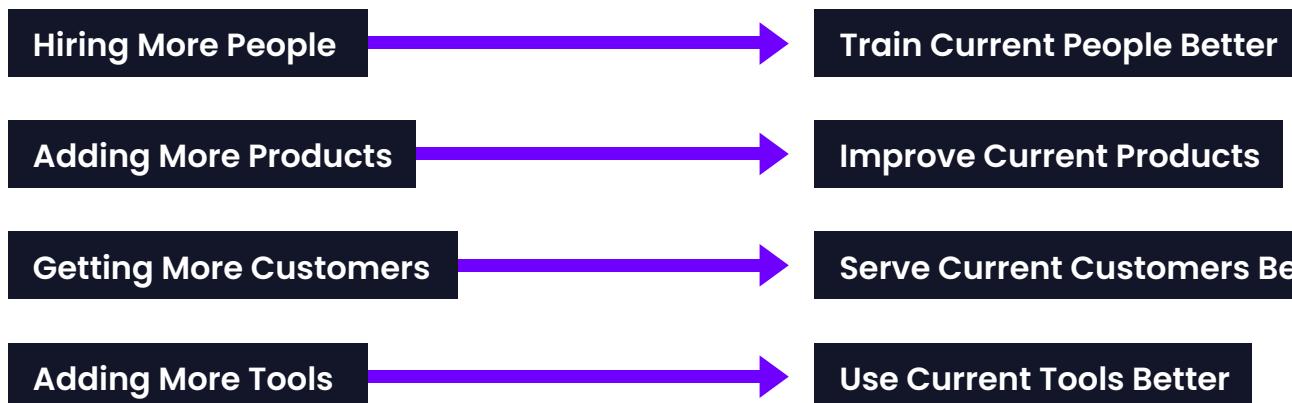
- Focus on one improvement at a time
- Measure results carefully
- Train people properly
- Create good systems
- Document everything
- Make sure changes stick

THE SECRET TO SUCCESS

THE REAL SECRET TO STAGE 6 IS REALIZING THAT “BETTER” BEATS “MORE.”



DON'T DO THIS

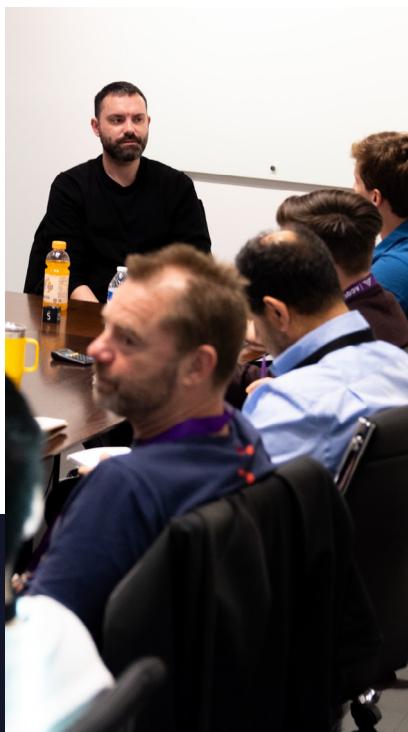


DO THIS INSTEAD

If you can make this shift from “more” to “better,” you’ll build a stronger business that’s ready for even bigger growth.

Remember, at this stage, success isn’t about doing more—it’s about getting more for what you do.

DO YOU WANT TO SCALE TO THE NEXT STEP?



The entrepreneurs most obsessed with “fast scale” are the ones who grow revenue and hit a wall. To avoid hitting a plateau you can’t breakthrough, you need to build the next foundation for scale. If you want our help to build the right foundations, we’ve just opened up a new scaling workshop. You can grab a seat below.

 Check Dates

**THIS IS THE
STAGE YOU JUST
GRADUATED FROM...**



STAGE 5: PRODUCTIZE

STAGE 5: PRODUCTIZE

HEADCOUNT	10 to 19	
YOUR ROLE	Director	
LEADERSHIP STRUCTURE	1.5 Layers: First 2-3 Managers	
# OF COMPANIES HERE	2,400,000	
CONSTRAINT		TO GRADUATE
PRODUCT	Customers have nothing else to buy from you & churn.	Connect CS & product. Make something new to sell them.
MARKETING	Qualified leads are too expensive and cap your ability to advertise	Spend more on niche down messaging with new offer & raise CAC limit (spend more). Start scoring your leads (you select). Attr. + CRO.
SALES	Customers get sold with unrealistic expectations and refunds/bad reviews become an issue.	Create sales aids/materials. Install weekly game tape between CS & Sales/Marketing for QA & feedback. Track NPS/CSAT/Refund rate by rep.
CUSTOMER SERVICE	Customers come in with unrealistic expectations. Get inconsistent answers.	Build proper CS playbook to onboard & train team to answer Qs same way. WKLY Game tape review. Customer ascension path.
INFORMATION TECH (IT)	Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business.	Company provides company owned/controlled hardware and software. Need dashboard/reporting system.
RECRUITING	Have trouble finding higher level roles/managers.	Deliberate promotions from within rather than Peter Principle. Incentivize employee referrals = CAT = cost to acquire talent.
HUMAN RESOURCES (HR)	You're firing people incorrectly and exposed.	Create termination policies and process.
FINANCE	You don't know how much money you can reinvest into growth.	Make a budget (save for big expenses), simple financial forecasting, begin keeping track of tax write offs.
Bottom line	Not making enough per customer. Low LTV:CAC.	Make and sell your second premium product to customers.

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 5**



YOUR ROLE

DIRECTOR



HEADCOUNT

10 to 19



BOTTOM LINE

Not making enough
per customer.
Low LTV:CAC.



GRADUATE BY

Make and sell your
second premium
product to customers

WHEN YOU HIT “STAGE 5: PRODUCTIZE”

You've grown to 10-19 employees! Around 2.4 million businesses reach this level. You're now a "Director" with your first 2-3 managers under you. This is when your original product is doing well, but that's not enough anymore. Your main challenge? You need a second product to keep growing. Specifically, you need to extend LTV - aka - you need to make more per customer. This gives you the cash to scale advertising and recruit even higher level people to your team to keep the growth coming.

THE BIG CHALLENGE: ONE PRODUCT ISN'T ENOUGH

The biggest problem at Stage 5 is that customers buy your product, but then they have nothing else to buy from you. They might even leave (churn) because they need other things you don't offer. That's why it's called the "Productize" stage - you need to create new products to sell to your existing customers. Let's look at what's happening:

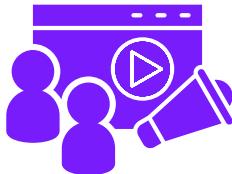
- Products and Sales
- Marketing and Customers
- Tech and Data
- People and HR
- Money Matters





Products & Sales

- Customers have nothing else to buy from you after their first purchase
- You need to connect customer service with product development
- You need to make something new to sell to existing customers
- Sales people are overpromising and causing refunds and bad reviews
- You need to create sales materials and record customer calls for training



Marketing and Customers

- Getting qualified leads is getting expensive
- Your marketing needs to be more targeted
- Customer support is inconsistent - different people give different answers
- You need a proper playbook for customer service
- You need a plan for moving customers to higher-level products



Tech and Data

- Employees are using their personal computers and software
- When people leave, they take company information with them
- You need company-owned computers and software
- You need a way to track leads and customers
- You need dashboards to show important numbers



People and HR

- It's hard to find managers and higher-level employees
- You should promote good employees from within when possible
- You're firing people incorrectly and could get in trouble
- You need proper termination policies
- You need ways to encourage employee referrals

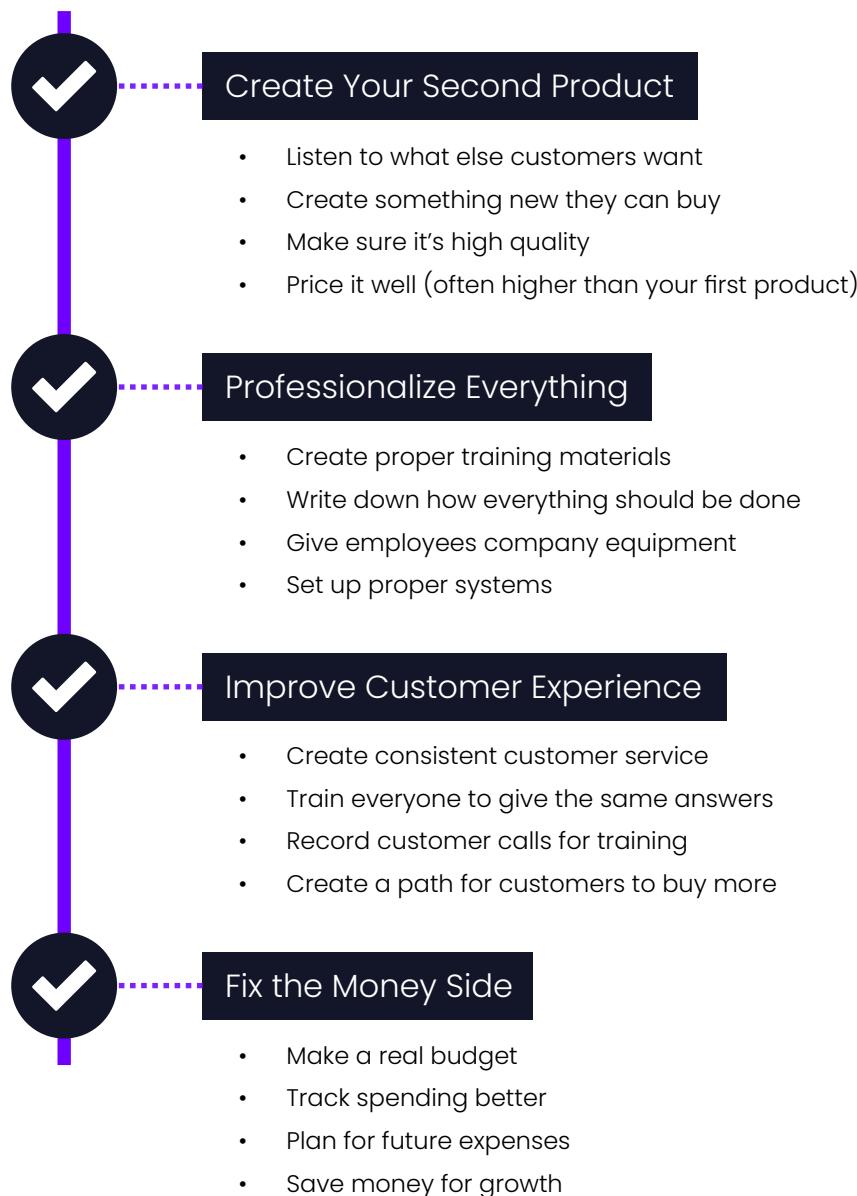
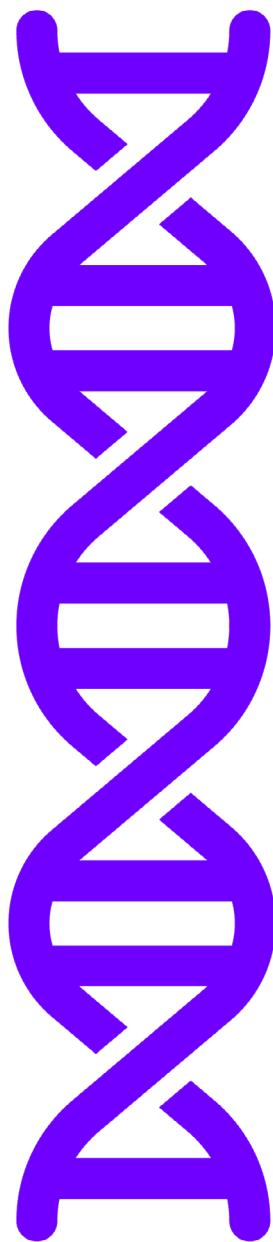


Money Matters

- You don't know how much money you can reinvest in growth
- You need a real budget
- You need simple financial forecasting
- You need to track tax write-offs better

WHAT SUCCESS LOOKS LIKE AT STAGE 5

Your job is to create a second premium product while making everything more professional. Here's what you need to do:



THE BOTTOM LINE

STAGE 5 IS ABOUT GOING FROM “ONE-HIT WONDER” TO HAVING MULTIPLE SUCCESSFUL PRODUCTS. YOU CAN’T GROW JUST BY SELLING MORE OF THE SAME THING. YOU NEED TO:



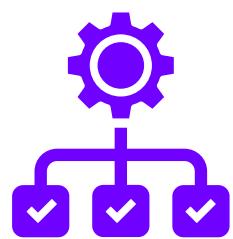
CREATE NEW PRODUCTS



SELL MORE TO EXISTING CUSTOMERS



MAKE EVERYTHING MORE PROFESSIONAL



SET UP PROPER SYSTEMS

This is when your business starts feeling like a real company that could keep growing for years. Instead of just doing one thing well, you’re building a business that can do several things well.

WHY IT’S CHALLENGING:

- Making a second product is hard
- You’re still fixing problems with the first product
- Everything needs to become more professional
- You need to spend money to grow

BUT IT’S WORTH IT BECAUSE:

- You can sell more to existing customers
- You reduce risk by having multiple products
- You build a stronger, more valuable company
- You create paths for future growth

REMEMBER

The key to Stage 5 is balance. You need to keep your first product running well while creating something new. You need to stay profitable while investing in growth. You need to keep current customers happy while attracting new ones.

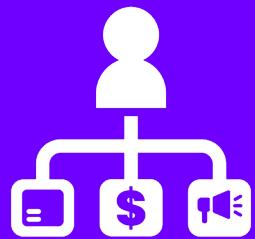
About 2.4 million businesses have figured out this balance. The ones that succeed usually:

- Start small with their second product
- Test it with their best customers

- Make sure it’s truly needed
- Price it well (usually higher than their first product)
- Keep the first product running smoothly while developing the new one

If you can master this balancing act, you’ll have a business that’s built to last and ready to grow even bigger.

THIS IS WHAT'S COMING NEXT...

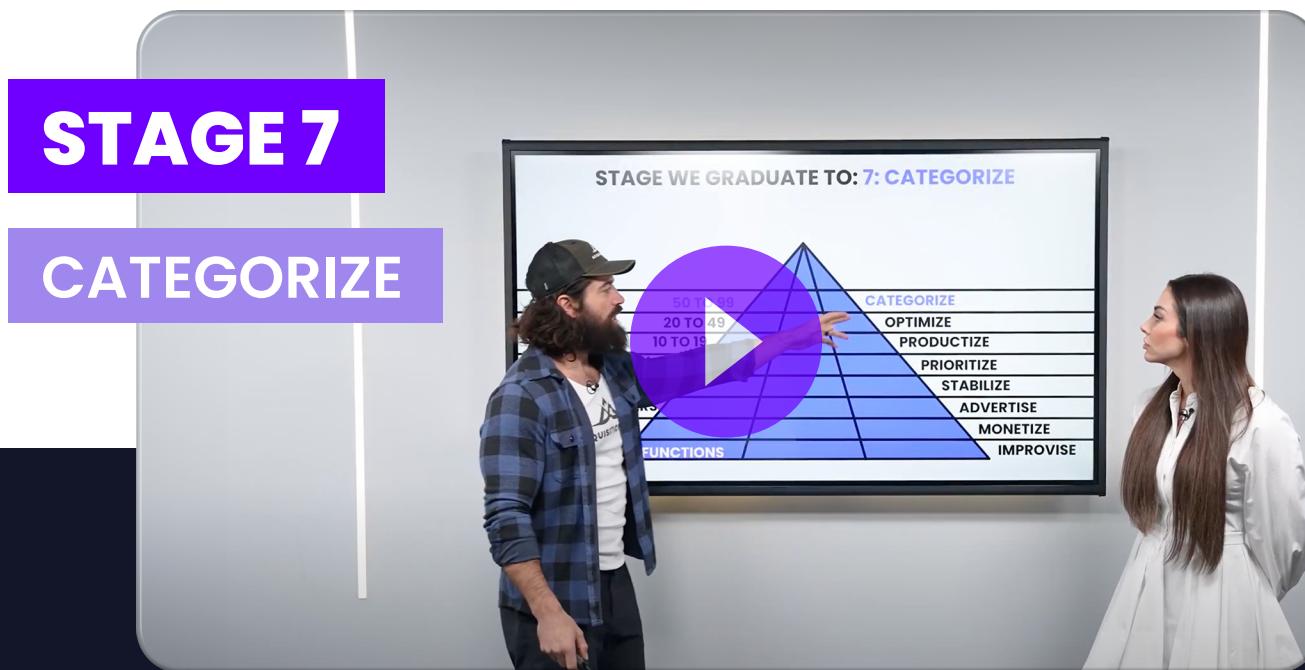


STAGE 7: CATEGORIZE

STAGE 7: CATEGORIZE

HEADCOUNT	50 to 99	
YOUR ROLE	Executive	
LEADERSHIP STRUCTURE	3 Layers: Leadership Team	
# OF COMPANIES HERE	1,200,000	
CONSTRAINT		
PRODUCT	Product outdated. Improvements take too long to roll out.	Fix one problem at a time with focused feature specific teams.
MARKETING	Lead flow is volatile because you only have <u>one way</u> to get customers.	Fund 2nd acq channel with referral process (& track it) & segmented LT nurture by lead score. Pick most similar platform-->or new core 4.
SALES	Leads getting wasted. Not worked consistently.	Better schedule coverage. Create lead nurture checklist & kudos for top show rates.
CUSTOMER SERVICE	CS only reactive. All firefighting.	Create proactive customer journey & communication. Focus on renewals and ascensions.
INFORMATION TECH (IT)	Data, IP, Access all over the place and disorganized.	Network technology. Bring solutions to the cloud. Data host. Centrally locate hardware if onsite.
RECRUITING	Takes too long to hire good people and they get hired elsewhere. You have too many roles open to keep track of candidates and where they're at in the process.	Install Applicant Tracking System to keep track of so many open roles. Pay specialized recruiting firms to keep up.
HUMAN RESOURCES (HR)	There are too many different places for employee information and you have no data	Setup HRIS - Human Resource Information System
FINANCE	Your team starts spending your money stupidly.	QTRLY expense management. Budgets by dept. Cards w limits. Expense approval process. Add insurance coverage & get fancier projections.
Bottom line	Every system is overwhelmed. The business is disorganized.	Triage appropriately.

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 7**



YOUR ROLE

EXECUTIVE



HEADCOUNT

50 to 99



BOTTOM LINE

Every system is overwhelmed.
The business is disorganized.



GRADUATE BY

Triage appropriately.

WHEN YOU HIT “STAGE 7: CATEGORIZE”

HERE'S A SIMPLE EXPLANATION OF STAGE 7 (CATEGORIZIZE) WHEN A BUSINESS HAS 50–99 EMPLOYEES:

At this stage, your business has grown quite a bit – you now have between 50 and 99 employees. Only about 1.2 million companies in the US ever reach this size. You're no longer just a manager or leader – you're now an executive with three layers of leadership under you. The main challenge at this stage is that everything feels messy and disorganized. Let me break down what's happening and what needs to be fixed in each area:

- Product Problems
- Marketing Problems
- Sales Problems
- Customer Service Problems
- Tech Problems
- Recruiting Problems
- HR Problems
- Money Problems





Products Problems

Your product is starting to feel outdated, and it takes forever to make improvements. Imagine trying to fix up an old car – there are so many things that need work, but you can't fix everything at once. The solution is to make your teams focus on fixing one problem at a time. Instead of everyone trying to fix different things, you have specific teams work on specific features.



Marketing Problems

Your business is like a boat with only one engine – if that engine breaks, you're stuck. Right now you only have one main way of getting customers. This is risky because if something goes wrong with that method, your whole business could be in trouble. The fix is to add a second way to get customers, like starting a referral program where happy customers bring in new ones. You also need to get better at scoring leads (potential customers) so you know which ones are worth pursuing.



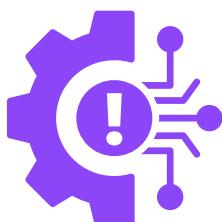
Sales Problems

Leads (potential customers) are being wasted because your sales team isn't working them consistently. It's like having a garden but forgetting to water some plants. The solution is to create better schedules so someone is always available to talk to potential customers. You also need to create a checklist for following up with leads and reward salespeople who get lots of customers to show up for meetings.



Customer Service Problems

Your customer service team is always putting out fires instead of preventing problems. It's like being a firefighter who's always rushing to emergencies instead of helping people prevent fires in the first place. The fix is to create a plan that helps prevent customer problems before they happen and focus on getting customers to renew their contracts and buy more stuff.



Tech Problems

Your company's important information, documents, and passwords are scattered everywhere – it's like having important papers spread all over your house instead of organized in filing cabinets. The solution is to move everything to the cloud (online storage) and set up a central place where all company data is stored. If you have physical computers and equipment, those need to be organized too.



Recruiting Problems

It's taking too long to hire good people, and sometimes they accept other jobs before you can hire them. Also, you have so many open positions that it's hard to keep track of all the people applying. The fix is to get special software that helps track job candidates and hire professional recruiting firms to help find people faster.



HR Problems

Employee information is scattered in too many different places – like having one drawer for medical forms, another for tax papers, and another for performance reviews. The solution is to get an HRIS (Human Resource Information System) – think of it as one big digital filing cabinet that keeps all employee information organized in one place.



Money Problems

Your team is spending money without thinking carefully about it. It's like giving everyone a credit card without any rules about how to use it. The fix is to create quarterly (every three months) budgets for each department, give people spending limits, and require approval for big purchases. You also need better insurance coverage and better financial forecasting.

THE BIG PICTURE

At Stage 7, everything feels overwhelming and disorganized. The key is to start sorting things into categories (that's why this stage is called "Categorize") and create systems to handle each category properly. It's like organizing a messy garage – first you sort everything into piles (tools, sports equipment, holiday decorations, etc.), then you create a proper storage system for each category.

THE BOTTOM LINE

YOUR MAIN JOB AT THIS STAGE IS TO SORT THROUGH THE CHAOS AND START ORGANIZING EVERYTHING. THIS MEANS ORGANIZING:



YOUR LEADS
(WHICH TO FOCUS ON)



YOUR CUSTOMERS
(WHICH ONES NEED
THE MOST ATTENTION)



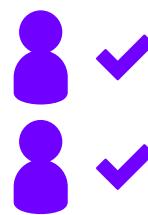
YOUR JOB APPLICANTS
(WHICH ONES
TO INTERVIEW)



YOUR MONEY
(WHAT TO SPEND
ON WHAT)



YOUR DATA
(WHERE EVERYTHING
IS STORED)



YOUR EMPLOYEES
(WHO DOES WHAT)

Only after you get everything properly sorted and organized can you move on to the next stage of growth. Think of it as laying the foundation for becoming an even bigger company. You need to segment these categories for what comes next...

DO YOU WANT TO SCALE TO THE NEXT STEP?



The entrepreneurs most obsessed with “fast scale” are the ones who grow revenue and hit a wall. To avoid hitting a plateau you can’t breakthrough, you need to build the next foundation for scale. If you want our help to build the right foundations, we’ve just opened up a new scaling workshop. You can grab a seat below.

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