

# \$100M SCALING ROADMAP

## ► STAGE 5: PRODUCTIZE ◀



A PERSONALIZED GUIDE FROM

# YOU ARE HERE

## STAGE 5: PRODUCTIZE



| 4: PRIORITIZE                |  |                              |  | 5: PRODUCTIZE        |                                |                      |                                | 6: OPTIMIZE          |          |                      |          |
|------------------------------|--|------------------------------|--|----------------------|--------------------------------|----------------------|--------------------------------|----------------------|----------|----------------------|----------|
| HEADCOUNT                    | 5 to 9   | HEADCOUNT                    | 10 to 19   | CONSTRAINT           |                                | TO GRADUATE          |                                | CONSTRAINT           |          | TO GRADUATE          |          |
| YOUR ROLE                    | Manager  | YOUR ROLE                    | Director   | LEADERSHIP STRUCTURE | 1.5 Layers: First 2-3 Managers | LEADERSHIP STRUCTURE | 1.5 Layers: First 2-3 Managers | LEADERSHIP STRUCTURE | Managers | LEADERSHIP STRUCTURE | Managers |
| # OF COMPANIES HERE          | 3,000,000  | # OF COMPANIES HERE          | 2,400,000 <th>CONSTRAINT</th> <td></td> <th>TO GRADUATE</th> <td></td> <th>CONSTRAINT</th> <td></td> <th>TO GRADUATE</th> <td></td>                            | CONSTRAINT           |                                | TO GRADUATE          |                                | CONSTRAINT           |          | TO GRADUATE          |          |
| <b>PRODUCT</b>               | You sold yes to anyone who would pay. Feedback from so many different customers creates too many product directions. | <b>PRODUCT</b>               | Customers have nothing else to buy from you & churn.   | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>MARKETING</b>             | Too many unqualified leads   | <b>MARKETING</b>             | Qualified leads are too expensive and cap your ability to advertise  | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>SALES</b>                 | Speed to contact drops. You have no metrics around sales.  | <b>SALES</b>                 | Customers get sold with unrealistic expectations and refunds/bad reviews become an issue.  | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>CUSTOMER SERVICE</b>      | No metrics for customer success.   | <b>CUSTOMER SERVICE</b>      | Customers come in with unrealistic expectations. Get inconsistent reviews.   | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>INFORMATION TECH (IT)</b> | New team isn't using everything.   | <b>INFORMATION TECH (IT)</b> | Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business. | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>RECRUITING</b>            | Wasting time with bad candidates.  | <b>RECRUITING</b>            | Have trouble finding higher level roles/managers.  | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>HUMAN RESOURCES (HR)</b>  | Employees don't know how to behave (proto, sick days, dress code, code of conduct).                                  | <b>HUMAN RESOURCES (HR)</b>  | You're firing people incorrectly and exposed.  | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>FINANCE</b>               | Cash flow is lumpy due to random "one-time" expenses. You find out that businesses eat money to run.                 | <b>FINANCE</b>               | You don't know how much money you can reinvest into growth.  | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |
| <b>Bottom line</b>           | Trying to be everything to everyone.   | <b>Bottom line</b>           | Not making enough per customer. Low LTV:CAC.   | <b>CONSTRAINT</b>    |                                | <b>TO GRADUATE</b>   |                                | <b>CONSTRAINT</b>    |          | <b>TO GRADUATE</b>   |          |

## 0. IMPROVISE

## 1. MONETIZE

## 2. ADVERTISE

## 3. STABILIZE

## 4. PRIORITIZE

## 5. PRODUCTIZE

## 6. OPTIMIZE

## 7. CATEGORIZE

## 8. SPECIALIZE

## 9. CAPITALIZE

# STAGE 5: PRODUCTIZE

| <b>HEADCOUNT</b>             | 10 to 19   |  |
|------------------------------|--|--|
| <b>YOUR ROLE</b>             | Director   |  |
| <b>LEADERSHIP STRUCTURE</b>  | 1.5 Layers: First 2-3 Managers   |  |
| <b># OF COMPANIES HERE</b>   | 2,400,000  |  |
| <b>CONSTRAINT</b>            |  | <b>TO GRADUATE</b>   |
| <b>PRODUCT</b>               | Customers have nothing else to buy from you & churn.   | Connect CS & product. Make something new to sell them.   |
| <b>MARKETING</b>             | 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.    |
| <b>SALES</b>                 | 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. |
| <b>CUSTOMER SERVICE</b>      | 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.                  |
| <b>INFORMATION TECH (IT)</b> | 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.  |
| <b>RECRUITING</b>            | Have trouble finding higher level roles/managers.  | Deliberate promotions from within rather than Peter Principle. Incentivize employee referrals = CAT = cost to acquire talent.            |
| <b>HUMAN RESOURCES (HR)</b>  | You're firing people incorrectly and exposed.  | Create termination policies and process.   |
| <b>FINANCE</b>               | 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.                              |
| <b>Bottom line</b>           | Not making enough per customer. Low LTV:CAC.   | Make and sell your second premium product to customers.  |

# WATCH THIS FIRST

**"START HERE"**



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



The methodology



The differences  
between stages



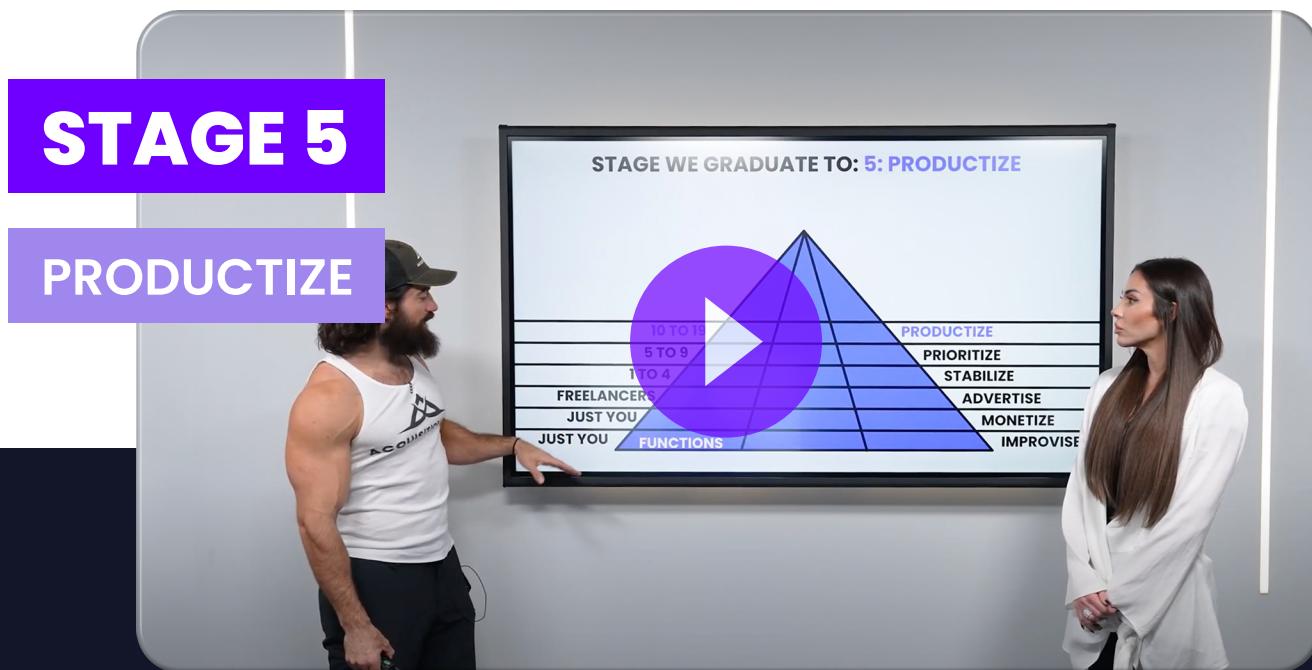
Repeat themes  
to be aware of



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 5**



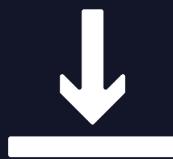
## YOUR ROLE

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:

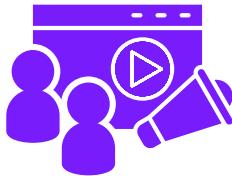
- Products and Sales
- Marketing and Customers
- Tech and Data
- People and HR
- Money Matters





## 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

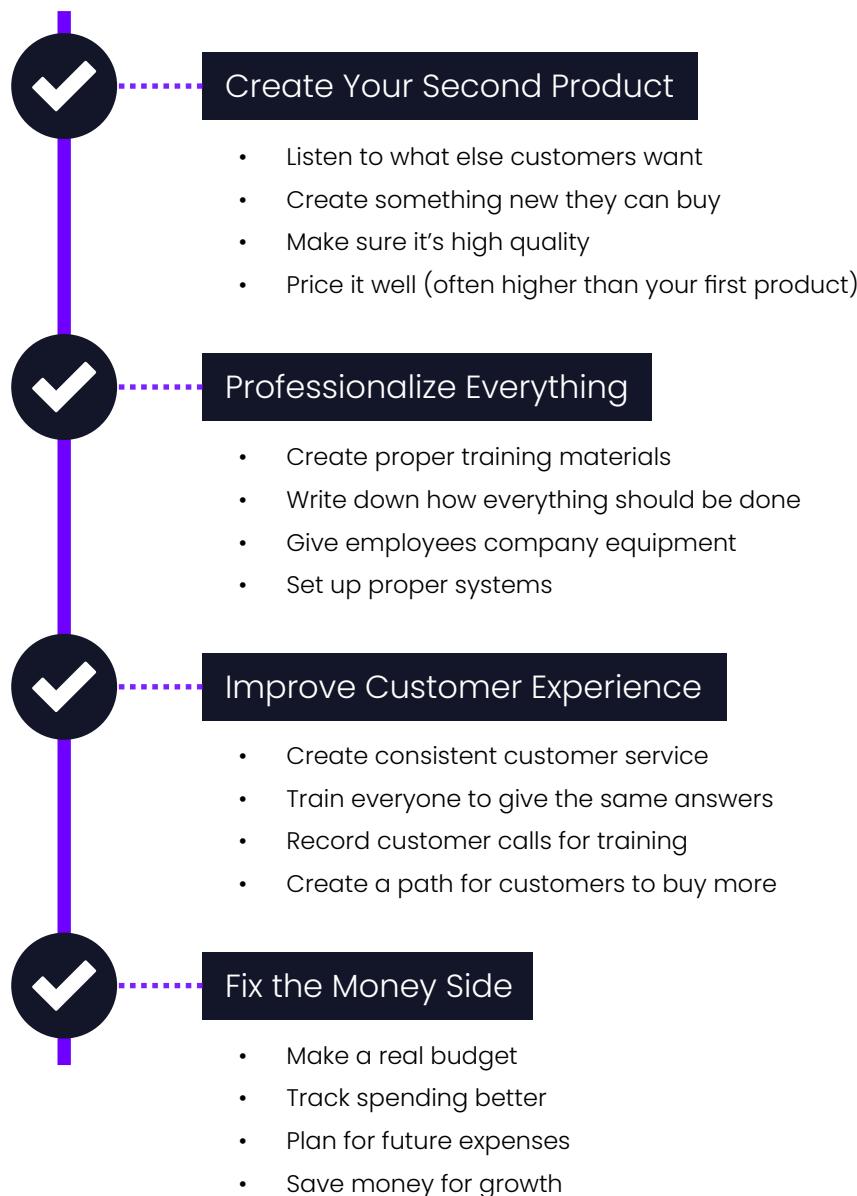
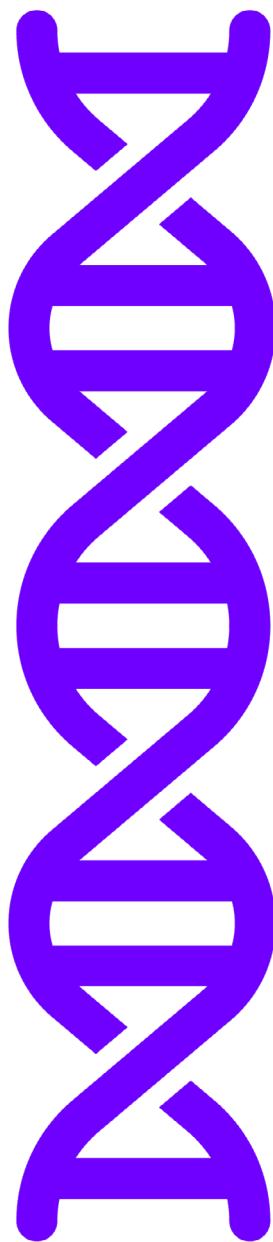


## Money Matters

- 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:**



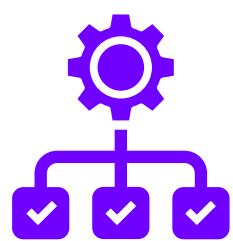
**CREATE NEW PRODUCTS**



**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

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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.

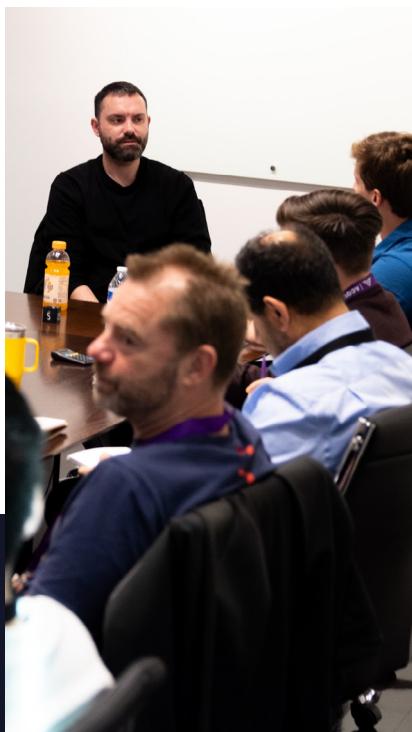
About 2.4 million businesses have figured out this balance. The ones that succeed usually:

- 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.

# DO YOU WANT TO SCALE TO THE NEXT STEP?

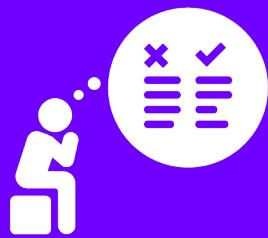


What they see: you've got a successful business. What you see: you don't take home much at the end of the month. Reason: You're not making enough profit. If you want to expand your margin, have more cash to grow, and make more money, you can see how we do this at a Scaling Workshop.



Check Dates

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

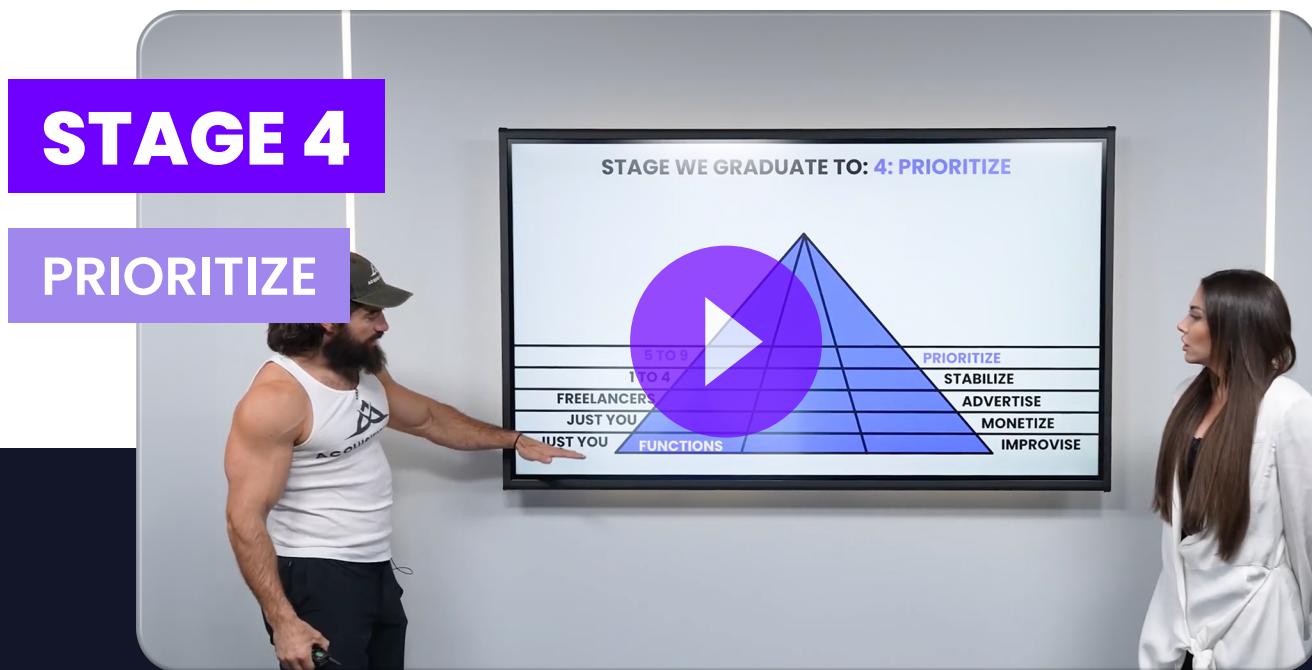


## STAGE 4: PRIORITIZE

# STAGE 4: PRIORITIZE

| HEADCOUNT             | 5 to 9   |  |
|-----------------------|--|--|
| YOUR ROLE             | Manager  |  |
| LEADERSHIP STRUCTURE  | 1 Layer: First Team  |  |
| # OF COMPANIES HERE   | 3,000,000  |  |
| CONSTRAINT            |  |  |
| PRODUCT               | You said yes to anyone who would pay. Feedback from so many different customers creates too many product directions. | Specialize product (v2) & price to serve niched down avatar.   |
| MARKETING             | Too many unqualified leads   | Make better free stuff & more creative to boost volume. Add qualification/friction so the extra volume self-selects. |
| SALES                 | Speed to contact drops. You have no metrics around sales.  | Track basic KPIs manually on spreadsheet (contact rate, sched, show, offer, close, cash collected).                  |
| CUSTOMER SERVICE      | No metrics for customer success.   | Install tracking & KPIs. Record and centralize notes for each customer in a CRM.                                     |
| INFORMATION TECH (IT) | New team isn't using everything.   | Get everyone on platforms. Protect passwords. Get project management tool & comms (work chat tool).                  |
| RECRUITING            | Wasting time with bad candidates.  | Learn how to conduct a proper interview and check references.  |
| HUMAN RESOURCES (HR)  | Employees don't know how to behave (PTO, sick days, dress code, code of conduct).                                    | Employee handbook & policies.  |
| FINANCE               | Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.                | Get profit and loss statements and cash flow statements setup. Get basic business insurance.                         |
| <b>Bottom line</b>    | Trying to be everything to everyone.   | Niche down to serve only people like your best customers.  |

# YOUR STAGE



THIS VIDEO PROVIDES AN  
IN-DEPTH LOOK AT THE CONSTRAINTS  
& SOLUTIONS AT **STAGE 4**



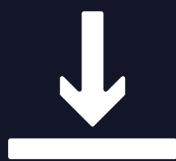
## YOUR ROLE

MANAGER



## HEADCOUNT

5 to 9



## BOTTOM LINE

Trying to be  
everything to  
everyone



## GRADUATE BY

Niche down to  
serve only people  
like your best  
customers

# WHEN YOU HIT “STAGE 4: PRIORITIZE”

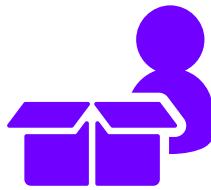
Welcome to having 5–9 employees! About 3 million businesses reach this level. This is when you change from being a “trainer” to becoming a real “manager.” You’ll have your first real team, with one layer of organization between you and the front-line workers. The big difference? You can’t do everything anymore – you have to choose what matters most.

## THE BIG CHALLENGE: TRYING TO PLEASE EVERYONE

The main problem at Stage 4 is that you’ve been saying “yes” to any customer who would pay you. Now that’s causing problems because different customers want different things. That’s why it’s called the “Prioritize” stage – you need to figure out who your best customers are and focus on them. Let’s break down what’s happening:

- Products and Customers
- Marketing and Sales
- Customer Service
- Tech and Tools
- People and HR
- Money Matters





## Products & Customers

- You've said yes to anyone who would pay, and now your product is pulled in too many directions
- You need to choose a specific type of customer to focus on
- You need to update your product to serve just those ideal customers
- You might need to raise your prices to match your specialized service



## Marketing & Sales

- You're getting too many unqualified leads (people who aren't right for your business)
- You need to create better free content to attract the right people
- Your sales team isn't following up with leads quickly enough
- You need to start tracking basic sales numbers like how many calls you make and how many people buy



## Customer Service

- You have no way to measure if customers are happy
- You need to start tracking customer satisfaction
- Customer information is scattered everywhere
- You need a proper system (CRM) to keep track of customer notes and interactions



## Tech and Tools

- Your new team isn't using all the tools properly
- You need to get everyone on the same platforms
- You need to protect passwords and data
- You need project management and team chat tools



## People and HR

- You're wasting time interviewing people who aren't right for the job
- You need to learn how to interview properly and check references
- Employees don't know basic rules about time off, dress code, etc.
- You need to create an employee handbook with basic policies

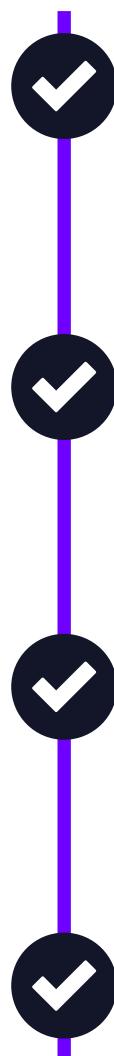
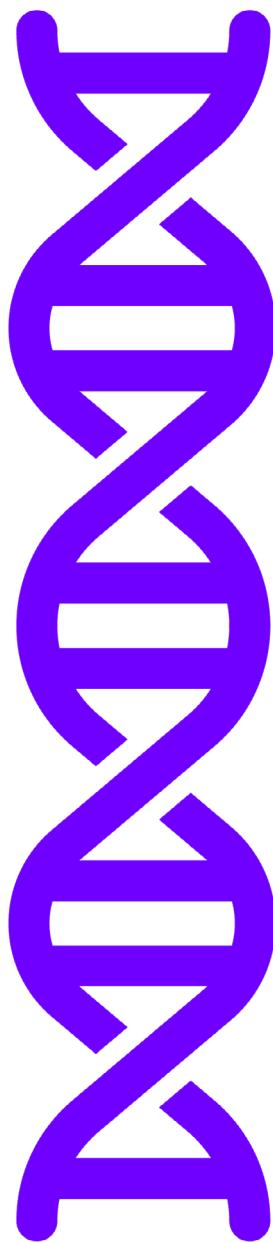


## Money Matters

- You keep getting surprised by "one-time" expenses
- You're learning that running a business costs more than you thought
- You need proper profit and loss statements
- You need basic business insurance

# WHAT SUCCESS LOOKS LIKE AT STAGE 4

Your job is to make the business more focused and professional. Here's what you need to do to graduate from Stage 4:



## Choose Your Focus

- Figure out who your best customers are
- Change your product to serve them better
- Stop trying to please everyone
- Be willing to say "no" to customers who aren't a good fit

## Get Organized

- Set up proper systems for tracking sales
- Keep all customer information in one place
- Make sure everyone uses the same tools
- Create basic rules and policies

## Start Measuring Things

- Track how many leads turn into sales
- Measure customer satisfaction
- Monitor how quickly you respond to leads
- Keep track of basic financial numbers

## Make Things Professional

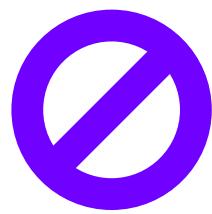
- Write an employee handbook
- Set up proper insurance
- Create basic processes for everything
- Start running your business like a real company

# THE BOTTOM LINE

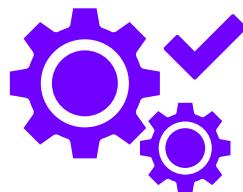
**STAGE 4 IS ALL ABOUT FOCUS AND PRIORITIES. YOU CAN'T SERVE EVERYONE, AND YOU CAN'T DO EVERYTHING. YOU NEED TO CHOOSE WHAT'S MOST IMPORTANT AND FOCUS ON THAT. THIS MEANS:**



PICKING  
YOUR IDEAL  
CUSTOMERS



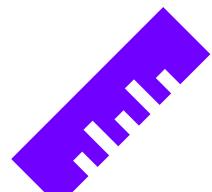
SAYING  
NO TO  
OTHERS



SETTING  
UP BASIC  
SYSTEMS



CREATING  
CLEAR  
RULES



MEASURING  
WHAT  
MATTERS

This is when your business starts feeling like a real company instead of just a group of people working together. It's when you stop trying to please everyone and start focusing on being really good at serving specific types of customers.

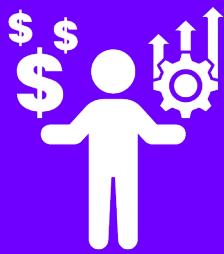
## REMEMBER

The key to Stage 4 is learning to say "no." No to customers who aren't right for you. No to projects that don't fit. No to doing everything yourself. That's how you build a focused, successful business that can grow even bigger.

want to build something bigger in the long term. About 3 million businesses have made this transition successfully. If you stay focused on serving your best customers really well, you will too.

It's a hard transition because saying "no" means turning down money in the short term. But it's necessary if you

# THIS IS WHAT'S COMING NEXT...

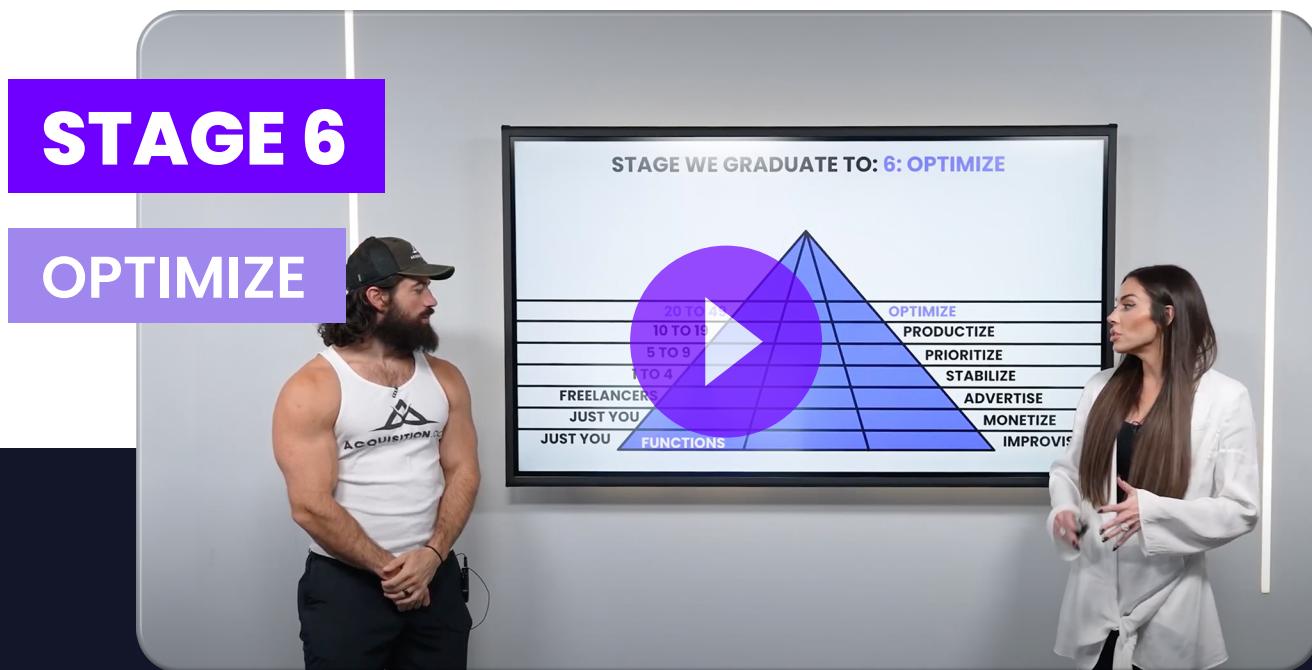


## STAGE 6: OPTIMIZE

# STAGE 6: OPTIMIZE

|                       |   |  |
|-----------------------|---|--|
| HEADCOUNT             | 20 to 49  |  |
| YOUR ROLE             | Leader  |  |
| LEADERSHIP STRUCTURE  | 2 Layers: Full Team of Managers   |  |
| # OF COMPANIES HERE   | 2,100,000   |  |
| <b>CONSTRAINT</b>     |   |  |
| 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.      |
| <b>Bottom line</b>    | Everything is inefficient.  | Grow by doing everything better rather than more.  |

# 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

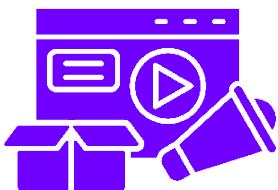
Sales and Customer Service

Tech and Security

People and HR

Money Matters





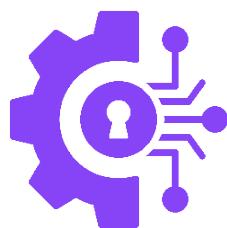
## Products and Marketing

- 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

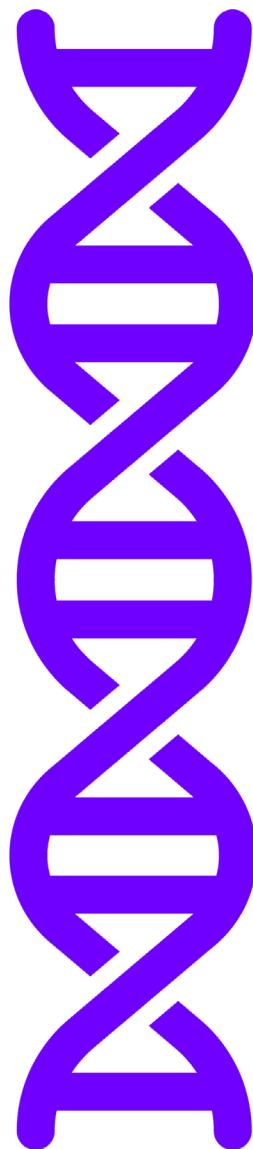


## Money Matters

- 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

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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:

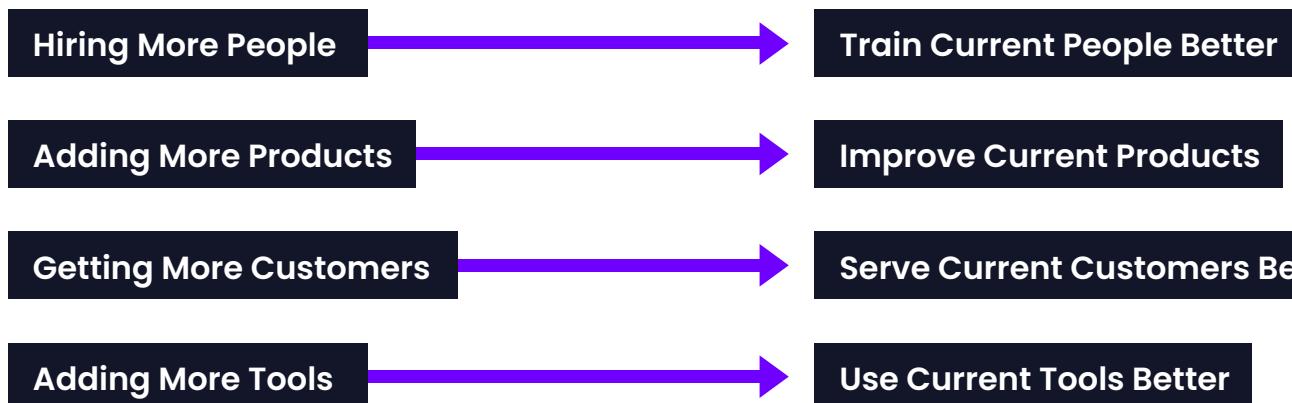
- Focus on one improvement at a time
- Measure results carefully
- Train people properly
- Create good systems
- Document everything
- Make sure changes stick

# 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?



What they see: you've got a successful business. What you see: you don't take home much at the end of the month. Reason: You're not making enough profit. If you want to expand your margin, have more cash to grow, and make more money, you can see how we do this at a Scaling Workshop.



Check Dates