

\$100M SCALING ROADMAP

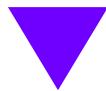
► STAGE 4: PRIORITIZE ◀



A PERSONALIZED GUIDE FROM

YOU ARE HERE

STAGE 4: PRIORITIZE



3: STABILIZE				4: PRIORITIZE				5: PRODUCTIZE							
HEADCOUNT	1 to 4	HEADCOUNT	5 to 9	YOUR ROLE	Manager	YOUR ROLE		LEADERSHIP STRUCTURE	1 Layer: First Team	LEADERSHIP STRUCTURE		# OF COMPANIES HERE	7,140,000 (24% of companies)	# OF COMPANIES HERE	3,000,000
PRODUCT	No time to fix everything that's wrong.	PRODUCT	You said yes to anyone who would pay. Feedback from so many different customers creates too many product directions.	MARKETING	Specialize product (V2) & price to serve niched down avatar.	MARKETING	Make better free stuff & more creative to boost volume.	Sales	Add qualification/friction so the extra volume self-selects.	Sales	Install tracking & KPIs. Record and centralize notes for each customer in a CRM.	Customer Service	Concentrate & prioritize. Make something new to sell them.	Customer Service	Spending more on one down messaging with new offer & noise. CAC limit (spend more). Yearly scoring your leads (you select), Attn. + CEO.
MARKETING	Leads aren't buying fast enough (older).	Marketing	Too many unqualified leads	Sales	Track basic KPIs manually on spreadsheet (contact rate, scheduled show, offer, close, cash collected).	Sales	Install tracking & KPIs. Record and centralize notes for each customer in a CRM.	Customer Service	Install tracking & KPIs. Record and centralize notes for each customer in a CRM.	Customer Service	Create sales exec/increases. Install weekly game type between CS & sales/marketing for QA & feedback. Track MFS/CAT/Refund rate by rep. Build proper CS playbook to onboard & train team to answer Qs some way. Will Game type review. Customer escalation path.	Bottom line	Company provides company owned/controlled hardware and software. Need dashboard/reporting system.	Bottom line	Deliberate promotion from who else other than Pres. Principle. Incentivize employee referrals - > CAH - root to acquire talent.
SALES	Wasting time with bad leads.	Sales	Speed to contact drops. You have no metrics around sales.	Customer Service	No metrics for customer success.	Customer Service	Get everyone on platform. Protect passwords. Get project management tool & commms (work chat tool).	Recruiting	New team isn't using everything.	Recruiting	Learn how to conduct a proper interview and check references.	Human Resources (HR)	Create term sheet for employees and process.	Human Resources (HR)	More budget (save for big expenses), simple financial forecasting.
CUSTOMER SERVICE	You don't have enough time to talk to good leads.	Customer Service	Wasting time with bad leads.	Information Tech (IT)	Not getting quality applicants.	Information Tech (IT)	Get everyone on platform. Protect passwords. Get project management tool & commms (work chat tool).	Finance	Employee don't know how to behave (#TO, sick days, dress code, code of conduct).	Finance	Employee handbook & policies.	Bottom line	In money you can reinvest into growth.	Bottom line	Begin keeping track of tax write-offs.
INFORMATION TECH (IT)	New customers feel lost.	Information Tech (IT)	Not getting quality applicants.	Recruiting	Wasting time with bad candidates.	Recruiting	Learn how to conduct a proper interview and check references.	Human Resources (HR)	Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.	Human Resources (HR)	Get profit and loss statements and cash flow statements setup. Get basic business insurance.	Bottom line	Merge and sell your second premium product to customers.	Bottom line	Niche down to serve only people like your best customers.
HUMAN RESOURCES (HR)	You're not withholding employee taxes and fees.	Human Resources (HR)	Wasting time with bad candidates.	Finance	People getting paid informally.	Finance	Employee handbook & policies.	Bottom line	Trying to be everything to everyone.	Bottom line	Niche down to serve only people like your best customers.				
FINANCE	People getting paid informally.	Finance	Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.	Bottom line	There's too much for one person to do.	Bottom line	Employee handbook & policies.	Bottom line	Trying to be everything to everyone.	Bottom line	Niche down to serve only people like your best customers.				
Bottom line		Bottom line		Bottom line		Bottom line		Bottom line		Bottom line					

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

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.
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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.
Bottom line	Trying to be everything to everyone.	Niche down to serve only people like your best customers.

WATCH THIS FIRST

"START HERE"



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



The methodology



The differences
between stages



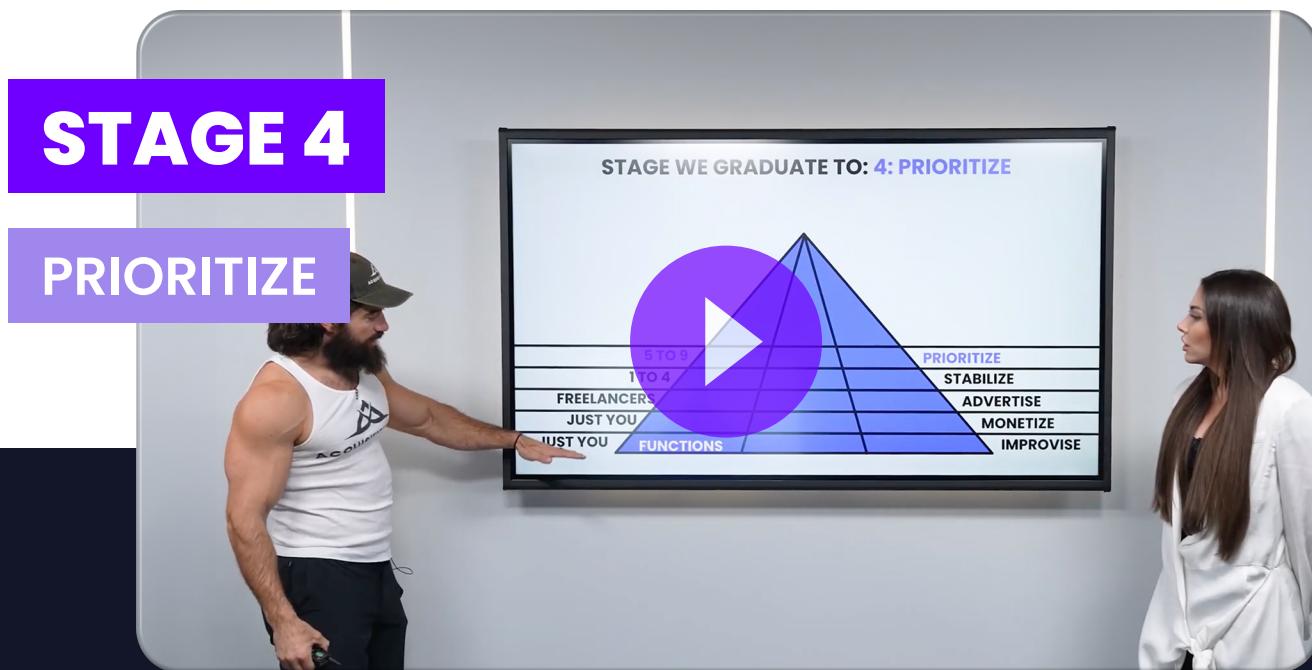
Repeat themes
to be aware of



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 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”

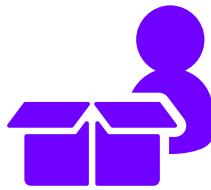
Welcome to having 5-9 employees! About 3 million businesses reach this level. This is when you change from being a “trainer” to becoming a real “manager.” You’ll have your first real team, with one layer of organization between you and the front-line workers. The big difference? You can’t do everything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

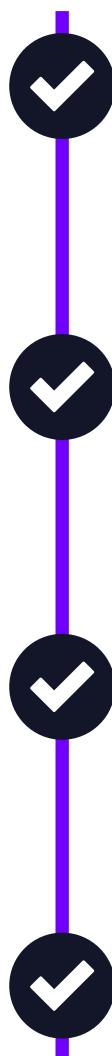
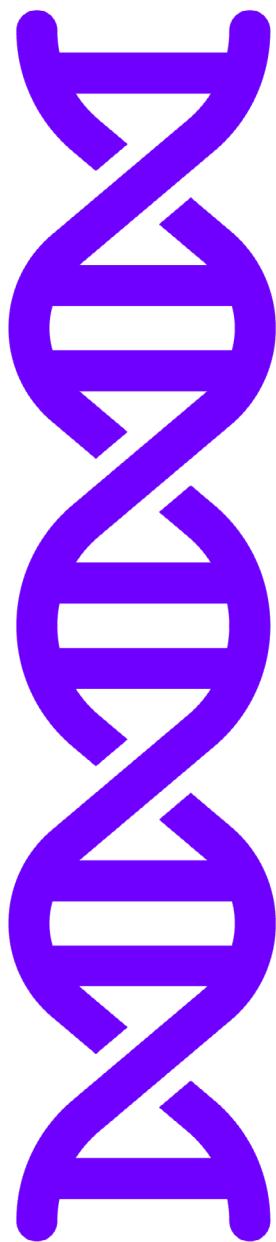


Money Matters

- 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

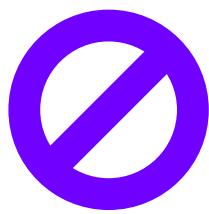
- Write an employee handbook
- Set up proper insurance
- Create basic processes for everything
- Start running your business like a real company

THE BOTTOM LINE

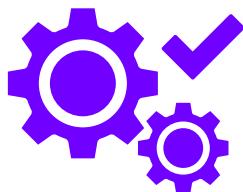
STAGE 4 IS ALL ABOUT FOCUS AND PRIORITIES. YOU CAN'T SERVE EVERYONE, AND YOU CAN'T DO EVERYTHING. YOU NEED TO CHOOSE WHAT'S MOST IMPORTANT AND FOCUS ON THAT. THIS MEANS:



PICKING
YOUR IDEAL
CUSTOMERS



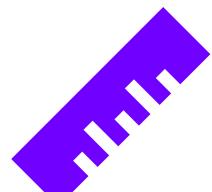
SAYING
NO TO
OTHERS



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.

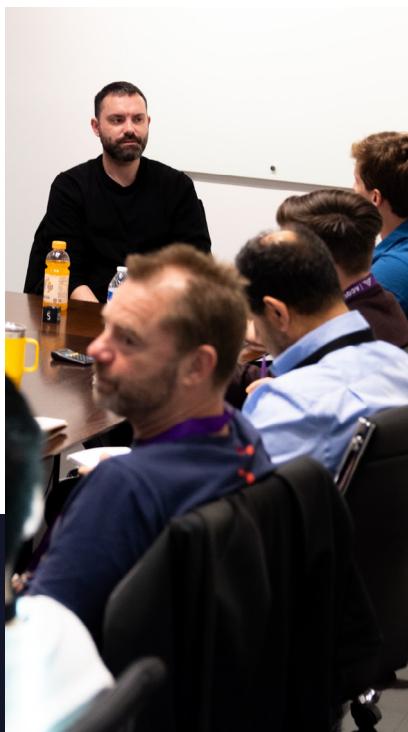
REMEMBER

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

DO YOU WANT TO SCALE TO THE NEXT STEP?



Trying to be everything to everyone? You need to niche down to serve only people like your best customers. A lot of businesses do lots of activity and they don't grow because they're solving the wrong problems – for the wrong person. If you want our help to select the right avatar, you can grab a seat at one of our next available workshops.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...

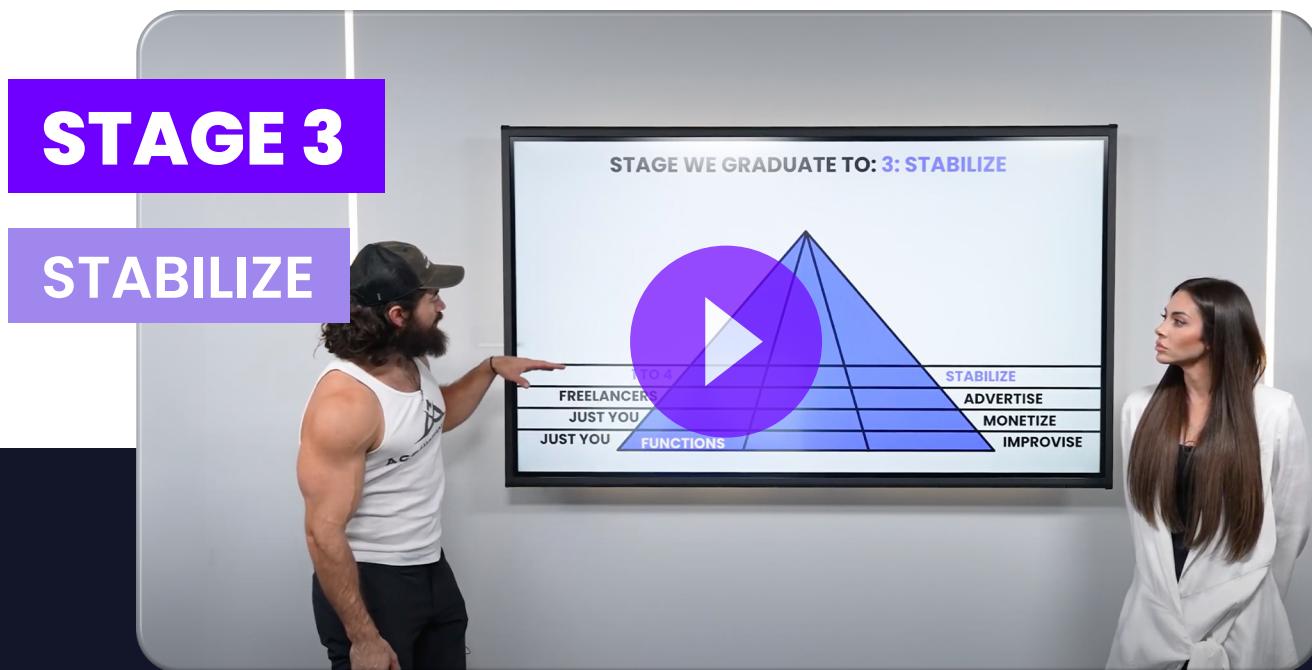


STAGE 3: STABILIZE

STAGE 3: STABILIZE

HEADCOUNT	1 to 4	
YOUR ROLE	TRAINER	
LEADERSHIP STRUCTURE	First full-time hires	
# OF COMPANIES HERE	7,140,000 (24% of companies)	
CONSTRAINT		
PRODUCT	No time to fix everything that's wrong.	Fix the thing they complain about most.
MARKETING	Leads aren't buying fast enough (colder)	Add long term nurture (emails &/or content)
SALES	Wasting time with bad leads. You don't have enough time to talk to good leads.	Decide on basic qualifications. Outsource setting & calendaring.
CUSTOMER SERVICE	New customers feel lost.	Learn to onboard customers properly.
INFORMATION TECH (IT)	You have a bunch of different tools that you don't use.	Figure out the useful ones. Extend free trial thru credits/discounts. Cut the rest. Basic sales pipeline.
RECRUITING	Not getting quality applicants.	Learn how to write a job description & review resumes.
HUMAN RESOURCES (HR)	You're not withholding employee taxes and fees.	Get a payroll provider so all taxes and fees by state are handled.
FINANCE	People getting paid informally.	Setup: Payroll processing, basic bookkeeping, managing invoices and payments.
Bottom line	There's too much for one person to do.	Get help.

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 3**



YOUR ROLE

TRAINER



HEADCOUNT

1 to 4



BOTTOM LINE

There's too much for
one person to do



GRADUATE BY

Get help

WHEN YOU HIT “STAGE 3: STABILIZE”

You've made it! You have your first 1-4 full-time employees. About 24% of businesses (around 7 million companies) reach this level. This is when you go from doing everything yourself to having real employees. Your role changes from “doer” to “trainer” because now you have to teach others how to help run the business.

THE BIG CHALLENGE: TOO MUCH WORK, NOT ENOUGH TIME

The main problem at Stage 3 is simple – there's way too much work for one person to handle. That's why it's called the “Stabilize” stage. Everything feels a bit chaotic and you need to make things more stable. Let's look at what's happening in each part of the business:

Products and Customers

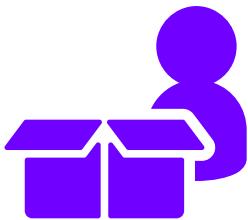
Sales and Service

Tech and Tools

People and HR

Money Matters





Products & Customers

- Your biggest headache is that you can't fix everything customers complain about
- You have to pick the ONE thing that bothers customers the most and fix just that
- Your leads (potential customers) aren't buying as quickly because they don't know you as well
- You need to start sending emails and creating content to build trust over time



Sales and Service

- You're wasting time talking to people who aren't serious about buying
- You need to make a list of what makes someone a "good" potential customer
- New customers often feel lost when they start using your product/service
- You need to create a proper way to welcome and guide new customers



Tech and Tools

- You probably bought too many different software tools thinking you'd use them all
- Now you need to figure out which ones you actually need and cancel the rest
- You should try to extend free trials or get discounts on the tools you keep
- You need a basic system to track your sales pipeline



People and HR

- It's hard to find good people to hire
- You need to learn how to write good job descriptions and review resumes properly
- You're probably not handling employee taxes correctly
- You need to get a payroll service to handle taxes and fees properly

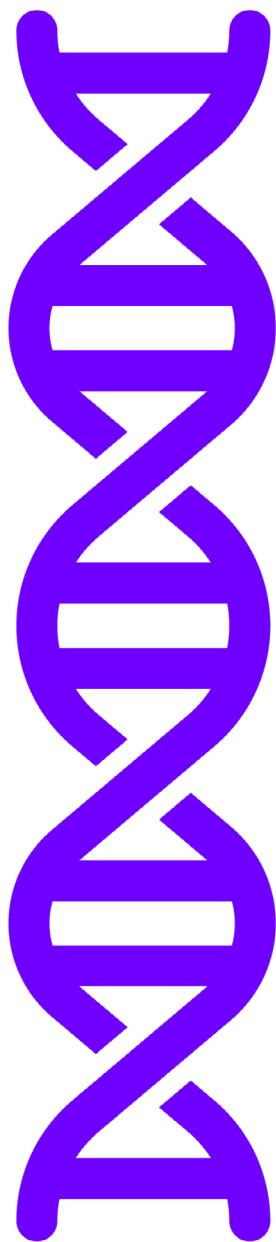


Customer Service

- People are getting paid informally (which isn't good)
- You need to set up proper payroll processing
- You need basic bookkeeping to track money coming in and going out
- You need to manage invoices and payments properly

WHAT SUCCESS LOOKS LIKE AT STAGE 3

Your job is to move from doing everything yourself to having a small team that can help run the business. Here's what you need to do to graduate from Stage 3:



-  **Fix Your Biggest Problem First**
 - Don't try to fix everything at once
 - Find the #1 thing customers complain about
 - Fix that one thing really well
 - Then move on to the next biggest problem
-  **Get Your Money In Order**
 - Set up proper payroll for employees
 - Start using basic accounting software
 - Make sure you're tracking all money coming in and going out
 - Have a system for managing bills and getting paid
-  **Help Your Team Help You**
 - Write down how you do important tasks
 - Train your team members properly
 - Give them the tools they need to do their jobs
 - Check their work to make sure it's done right
-  **Make Your Customers Happy**
 - Create a proper way to welcome new customers
 - Make sure they know how to use your product/service
 - Help them get results quickly
 - Keep in touch with them regularly

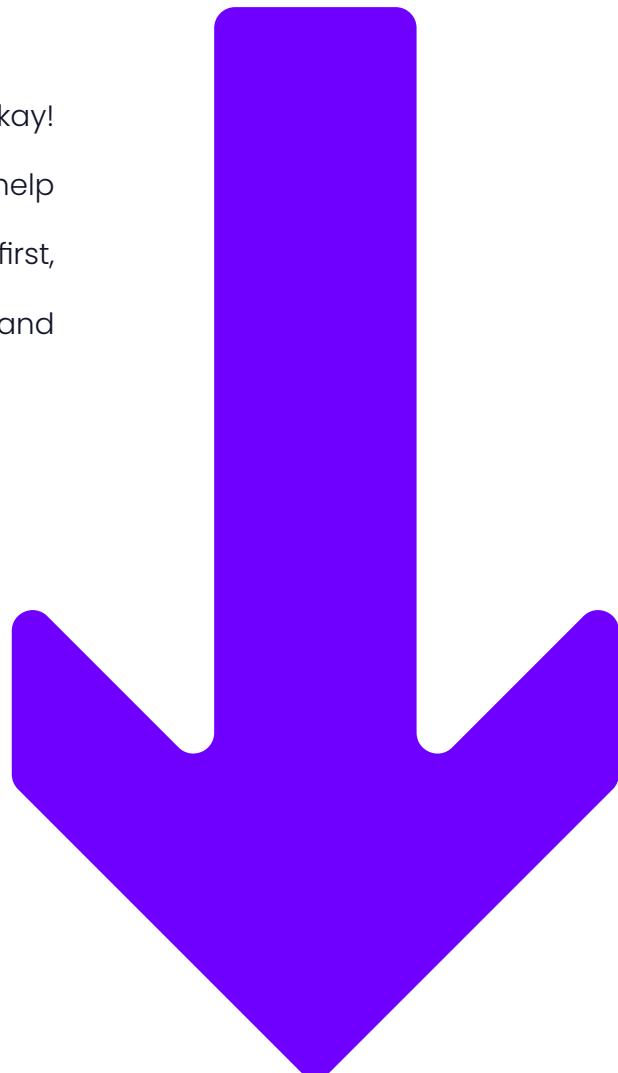
THE BOTTOM LINE

STAGE 3 IS ALL ABOUT GOING FROM CHAOS TO STABILITY.

You can't do everything yourself anymore, and that's okay!

Your job is to build a small team and teach them how to help run the business. Focus on fixing the biggest problems first, setting up proper systems for money and employees, and making sure customers get good results.

If you can get through this stage, you'll have a real business with real employees, not just a one-person show. It's hard work, but about 7 million other businesses have done it.



YOU CAN TOO!

REMEMBER

Don't try to fix everything at once. Pick the biggest problem, fix it well, then move on to the next one. That's how you stabilize a growing business.

THIS IS WHAT'S COMING NEXT...

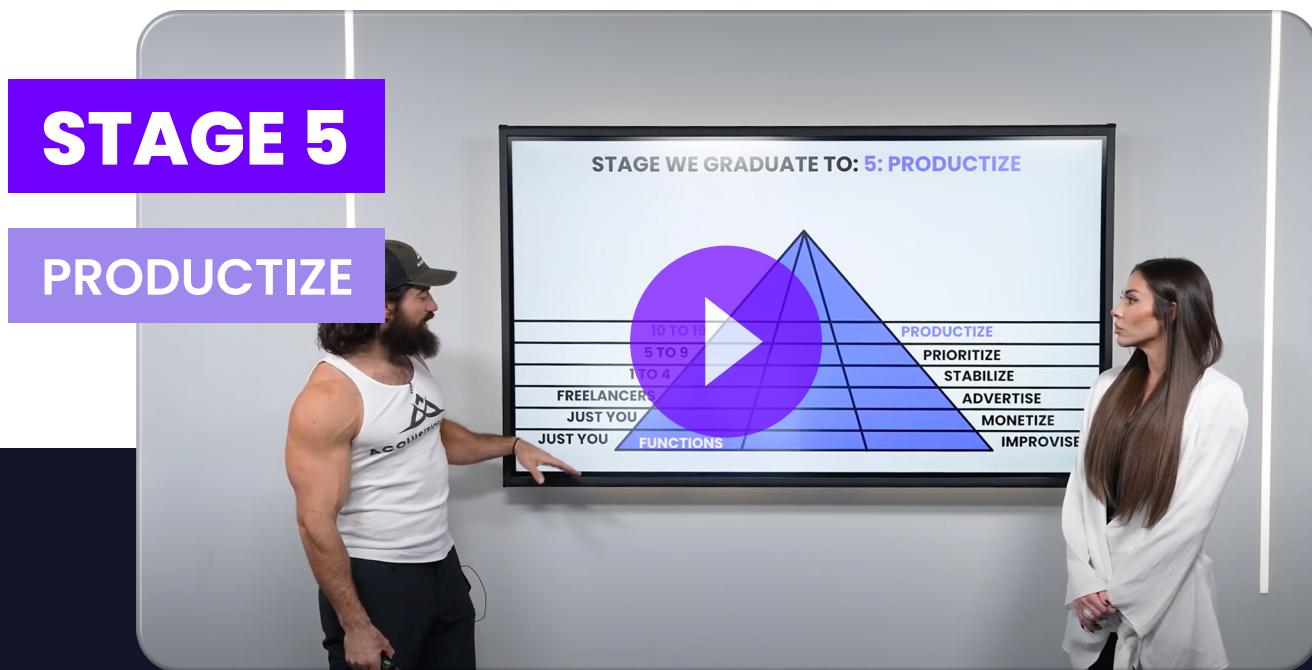


STAGE 5: PRODUCTIZE

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

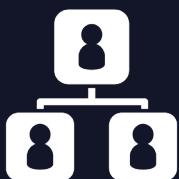


THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 5**



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:

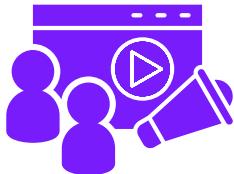
- Products and Sales
- Marketing and Customers
- Tech and Data
- People and HR
- Money Matters





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

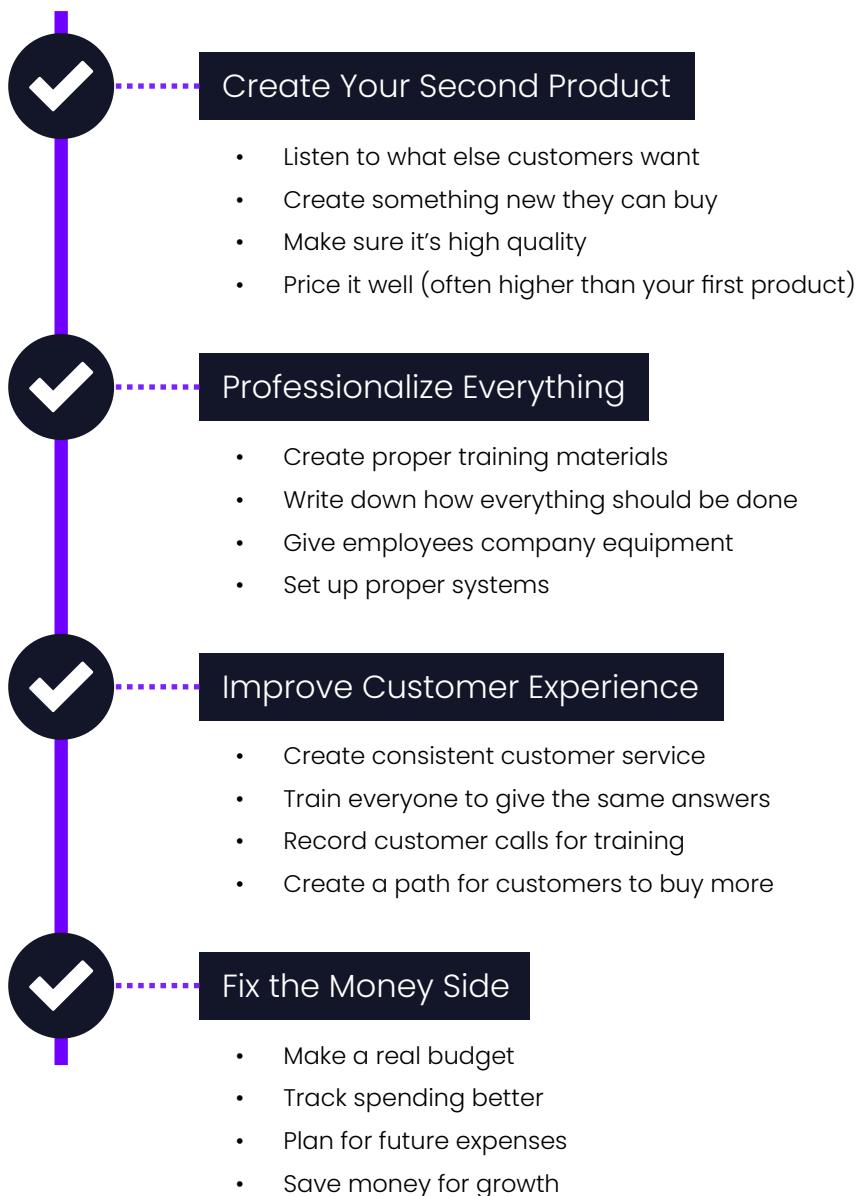
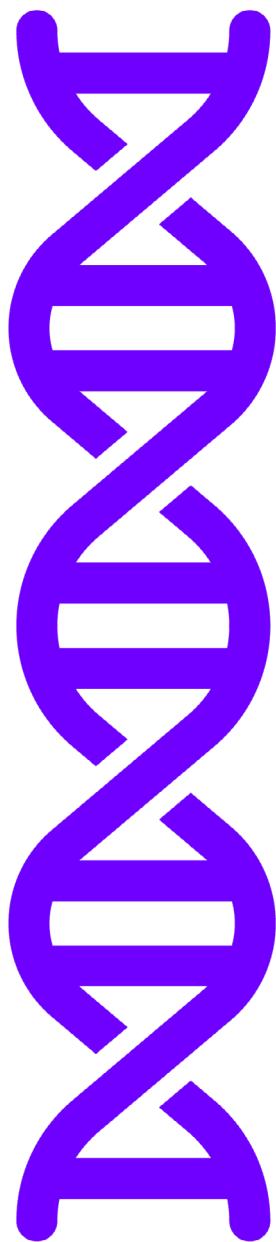


Money Matters

- 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:



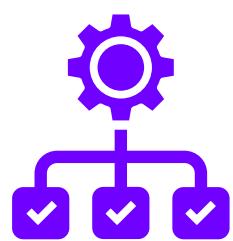
CREATE NEW PRODUCTS



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.

DO YOU WANT TO SCALE TO THE NEXT STEP?



Trying to be everything to everyone? You need to niche down to serve only people like your best customers. A lot of businesses do lots of activity and they don't grow because they're solving the wrong problems – for the wrong person. If you want our help to select the right avatar, you can grab a seat at one of our next available workshops.



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