

# \$100M SCALING ROADMAP

► STAGE 3: STABILIZE ◀



A PERSONALIZED GUIDE FROM

# YOU ARE HERE

## STAGE 3: STABILIZE



2: ADVERTISE				3: STABILIZE				4: PRIORITIZE							
HEADCOUNT	1	HEADCOUNT	1 to 4	YOUR ROLE	DOER	YOUR ROLE	TRAINER	LEADERSHIP STRUCTURE	First full-time hires	LEADERSHIP STRUCTURE		# OF COMPANIES HERE	30,000,000 (100% of companies)	# OF COMPANIES HERE	7,140,000 (24% of companies)
PRODUCT	Paying customers have higher expectations, product is <i>unavailable</i> & not good enough.	PRODUCT	No time to fix everything that's wrong.	CONSTRAINT	Fix the thing they complain about most.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
MARKETING	Lead flow is inconsistent (STOP/START)	MARKETING	Leads aren't buying fast enough (colder)	CONSTRAINT	Add long term nurture (emails &/or content)	TO GRADUATE		CONSTRAINT		TO GRADUATE					
SALES	Sales conversions are inconsistent	SALES	Wasting time with bad leads.	CONSTRAINT	Decide on basic qualifications.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
CUSTOMER SERVICE	Paid customers have higher standards & complain more.	CUSTOMER SERVICE	You don't have enough time to talk to good leads.	CONSTRAINT	Outsource setting & calendaring.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
INFORMATION TECH (IT)	You have no money to afford tech.	INFORMATION TECH (IT)	New customers feel lost.	CONSTRAINT	Learn to onboard customers properly.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
RECRUITING	Too much work for part timers.	RECRUITING	You have a bunch of different tools that you don't use.	CONSTRAINT	Figure out the useful ones. Extend free trial thru credits/discounts. Cut the rest. Basic sales pipeline.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
HUMAN RESOURCES (HR)	You have FTEs but structured like contractors.	HUMAN RESOURCES (HR)	Not getting quality applicants.	CONSTRAINT	Learn how to write a job description & review resumes.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
FINANCE	You don't keep track of money or have a way to pay taxes	FINANCE	You're not withholding employee taxes and fees.	CONSTRAINT	Get a payroll provider so all taxes and fees by state are handled.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
Bottom line	New customers are inconsistent.	Bottom line	People getting paid informally.	CONSTRAINT	Setup: Payroll processing, basic bookkeeping, managing invoices and payments.	TO GRADUATE		CONSTRAINT		TO GRADUATE					
		Bottom line	There's too much for one person to do.	CONSTRAINT		TO GRADUATE		CONSTRAINT		TO GRADUATE					

## 0. IMPROVISE

## 1. MONETIZE

## 2. ADVERTISE

## 3. STABILIZE

## 4. PRIORITIZE

## 5. PRODUCTIZE

## 6. OPTIMIZE

## 7. CATEGORIZE

## 8. SPECIALIZE

## 9. CAPITALIZE

# 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.
<b>Bottom line</b>	There's too much for one person to do.	Get help.

# WATCH THIS FIRST

**"START HERE"**



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



The methodology



The differences  
between stages



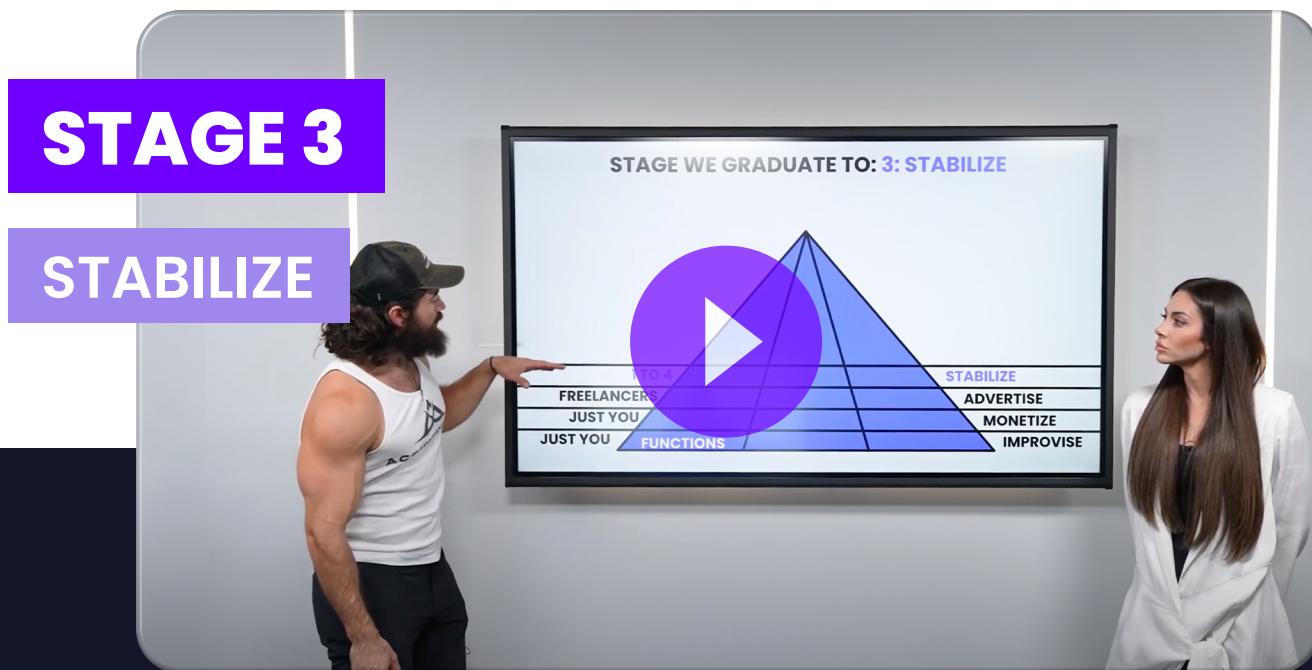
Repeat themes  
to be aware of



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 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

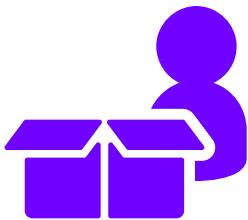
Sales and Service

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

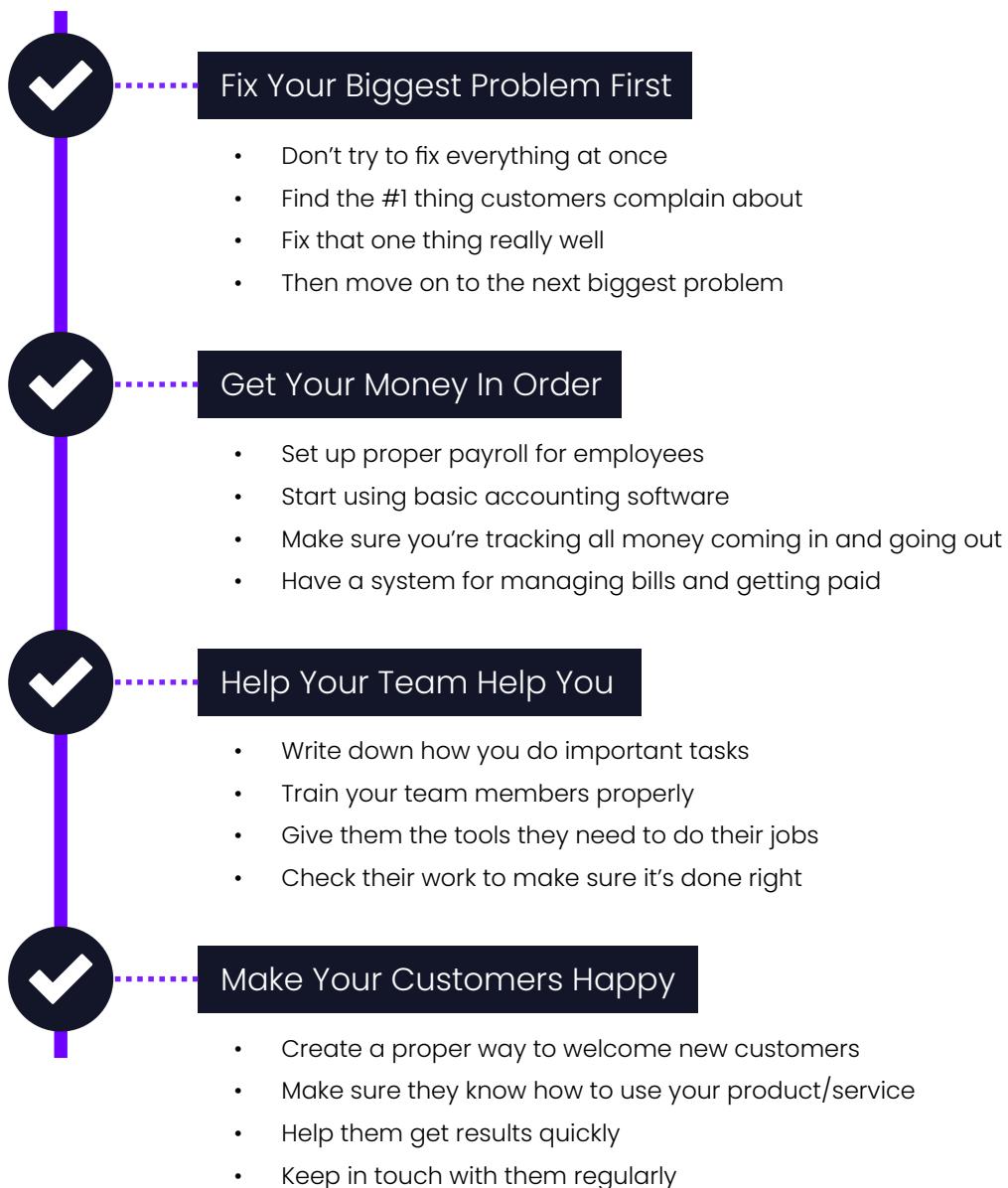
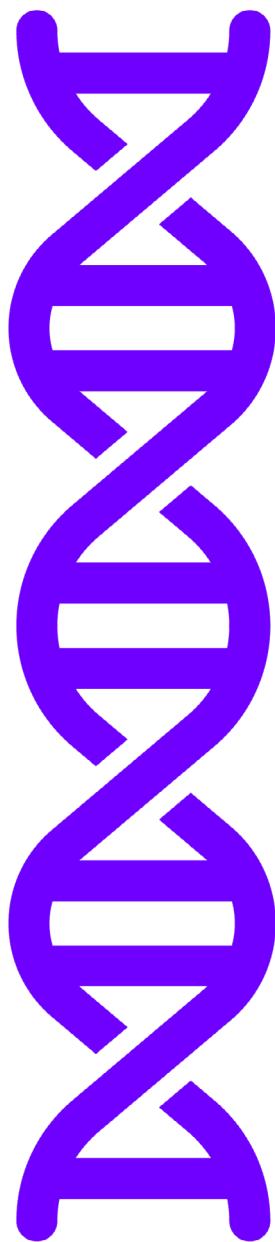


## Customer Service

- 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:



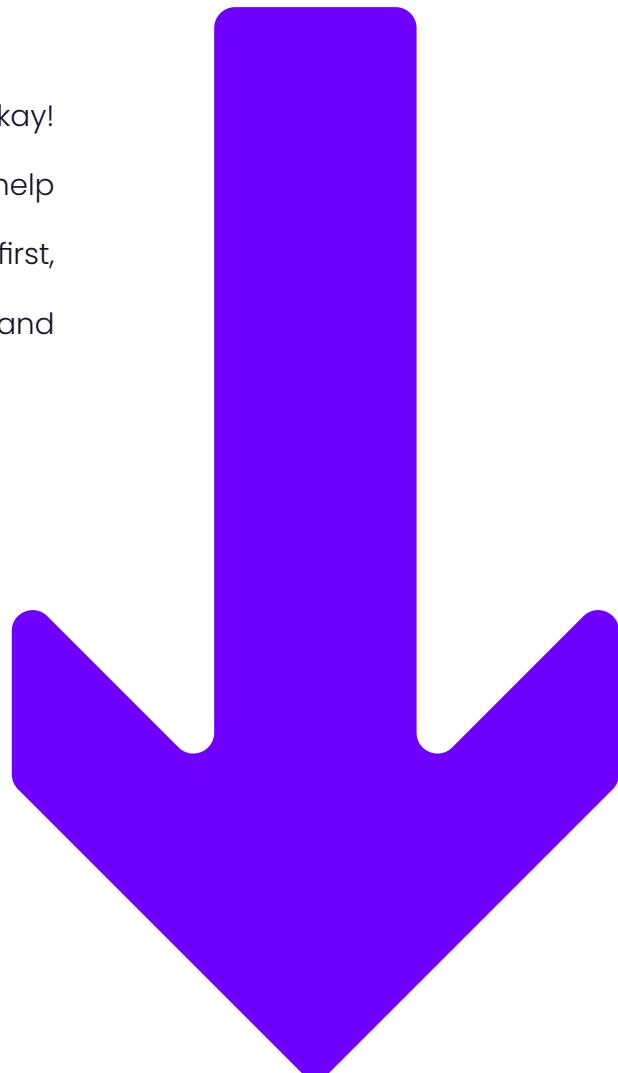
# THE BOTTOM LINE

## 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.

# DO YOU WANT TO SCALE TO THE NEXT STEP?



Over 24% of businesses get stuck here. There's too much for one person to do and the only way to reach the next level is to get help. If you want our advice on how to find a team for your business, check out one of our Scaling Workshops. You can grab a seat below.



Check Dates

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

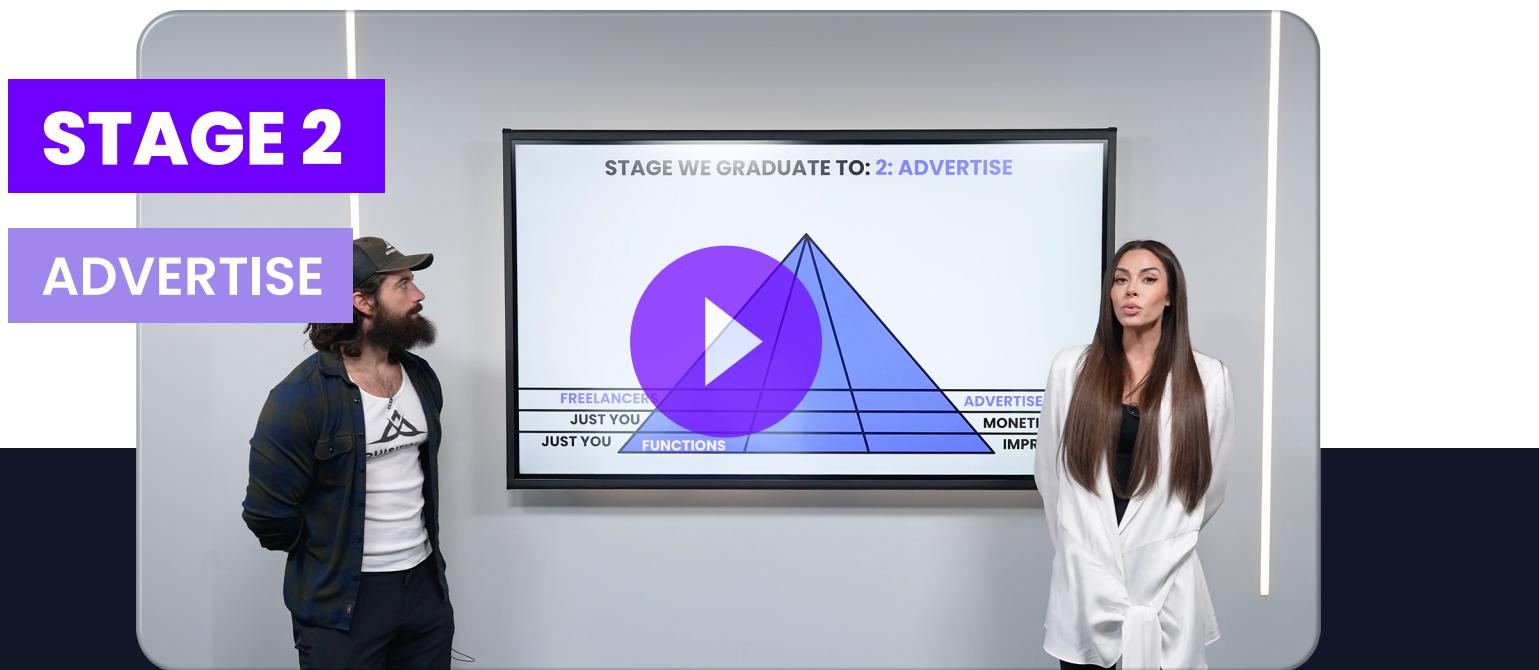


## STAGE 2: ADVERTISE

# STAGE 2: ADVERTISE

HEADCOUNT	1	
YOUR ROLE	DOER	
LEADERSHIP STRUCTURE	Freelancers	
# OF COMPANIES HERE	30,000,000 (100% of companies)	
CONSTRAINT		TO GRADUATE
PRODUCT	Paying customers have higher expectations, product is <u>unreliable</u> & not good enough.	Fix it good enough for now in an unscalable way.
MARKETING	Lead flow is inconsistent (STOP:START)	Live by the Rule of 100. Prioritize advertising daily.
SALES	Sales conversions are inconsistent	Nail down a script for setting and closing - CLOSER & ACA.
CUSTOMER SERVICE	Paid customers have higher standards & complain more.	Learn to deal with disappointed customers (Angry boat). Get testimonials from happy customers. (Epiphany script)
INFORMATION TECH (IT)	You have no money to afford tech.	Use free tech (google suite) and get free trials/credits for starter softwares. Website/hosting. Starter CRM/POS.
RECRUITING	Too much work for part timers.	Convert part timers to FTers, make public posts, or run ads on job boards to get full timers.
HUMAN RESOURCES (HR)	You have FTEs but structured like contractors.	Setup W-2 and 1099s.
FINANCE	You don't keep track of money or have a way to pay taxes.	Spin up quickbooks equivalent. Save for taxes. Check your bank account daily.
<b>Bottom line</b>	New customers are inconsistent.	Let more people know about your stuff.

# YOUR STAGE



THIS VIDEO PROVIDES AN  
IN-DEPTH LOOK AT THE CONSTRAINTS  
& SOLUTIONS AT **STAGE 2**



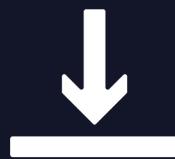
## YOUR ROLE

DOER



## HEADCOUNT

1



## BOTTOM LINE

New customers  
are inconsistent



## GRADUATE BY

Let more people know  
about your stuff

# WHEN YOU HIT “STAGE 2: ADVERTISE”

Welcome to Stage 2: The “Advertise” stage! You’ve made your first sales, and now it’s time to tell more people about your business. Think of this like moving from having a food stand that only your friends know about to actually advertising to get new customers who’ve never heard of you.

## THE BIG PICTURE:

In this stage, you’re what we call a “doer” – someone who’s actively running their business and starting to use freelancers for help. You’re still the main person, but now you’re beginning to get part-time help. They give you some time back and help you with tasks you don’t have the skills (or desire) to do. All businesses that survive reach this stage, so you’re in good company.

- Your Main Challenge: Product**
- Marketing Challenges
- Sales Challenges
- Customer Service
- Technology Needs
- Getting Help
- Managing People
- Money Management
- Daily Life at Stage 2
- Common Feelings at This Stage





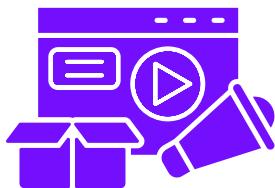
## Your Main Challenge: Product

Your paying customers are much pickier than your free ones were! They have higher expectations, and your product might not be reliable enough yet. Maybe your food service is sometimes great but sometimes inconsistent, or your computer repair work takes different amounts of time for similar problems.

The key here is to fix things in an “unscalable way.” This means doing whatever it takes to make customers happy, even if it’s not efficient. You might need to:

- Work longer hours to get things perfect
- Double-check everything
- Provide extra service at no charge
- Fix problems immediately when they come up

Think: driving to the convenience store to drop off ice cream to a customer’s house at 2AM. The point is to be valuable, not scalable yet.



## Marketing Challenges

Your biggest problem now is that your customer flow is inconsistent – sometimes you’re too busy, sometimes too quiet. It’s like having a restaurant that’s packed on weekends but empty on weekdays.

You need to:

- Follow the “Rule of 100” (spend 100 minutes daily on marketing)
- Make marketing a daily priority, not just when you’re slow. (Get ahead)
- Keep track of what brings in customers (actions & results).
- Test different ways of reaching people. Stick with the one that works best for you. Don’t try and diversify in the beginning. Double down on what works.



## Sales Challenges

Sales are up and down, and you need to fix that. It’s time to:

- Create a consistent sales script
- Learn the “CLOSER” method for converting leads
- Practice your pitch until it’s natural
- Track what works and what doesn’t



## Customer Service

Paying customers complain more and have higher standards. You need to:

- Learn to handle upset customers (using the “Angry Boat” method)
- Get testimonials from happy customers using the “Epiphany Script”
- Turn complaints into improvements
- Make every customer feel special



## Technology Needs

Money is tight, but you need basic tools. Focus on:

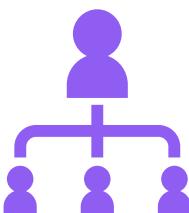
- Using free trials and credits
- Getting basic website/hosting
- Setting up a simple CRM (customer management system)
- Using free Google tools



## Getting Help

Your part-timers aren’t enough anymore. You need to:

- Start converting part-timers to full-time employees
- Post job ads
- Look for people who want steady work
- Be clear about expectations



## Managing People

Now that you have help, you need to:

- Set up proper employment paperwork (W2s and 1099s)
- Create basic training
- Establish work schedules
- Make responsibilities clear



## Money Management

Things are getting more complex with money. You need to:

- Set up QuickBooks or similar accounting software
- Save money for taxes
- Check your bank account daily
- Keep track of all expenses
- Start planning for bigger expenses



### Your Daily Life at Stage 2

Your typical day might include:

- Serving existing customers
- Marketing for new customers
- Managing part-time help
- Handling money
- Fixing problems
- Improving your product/service
- Talking to potential customers



### Common Feelings at This Stage

- Overwhelmed by all the moving parts
- Excited about growth
- Worried about consistency
- Proud of becoming a “real” business
- Stressed about managing others
- Concerned about money flow

## SIGNS YOU'RE DOING IT WELL

Customers are coming back

New customers are finding you

Your help is reliable

Money is steady (even if not huge)

Systems are starting to work

Problems get fixed quickly

## WARNING SIGNS TO WATCH FOR

Inconsistent quality

Customer complaints increasing

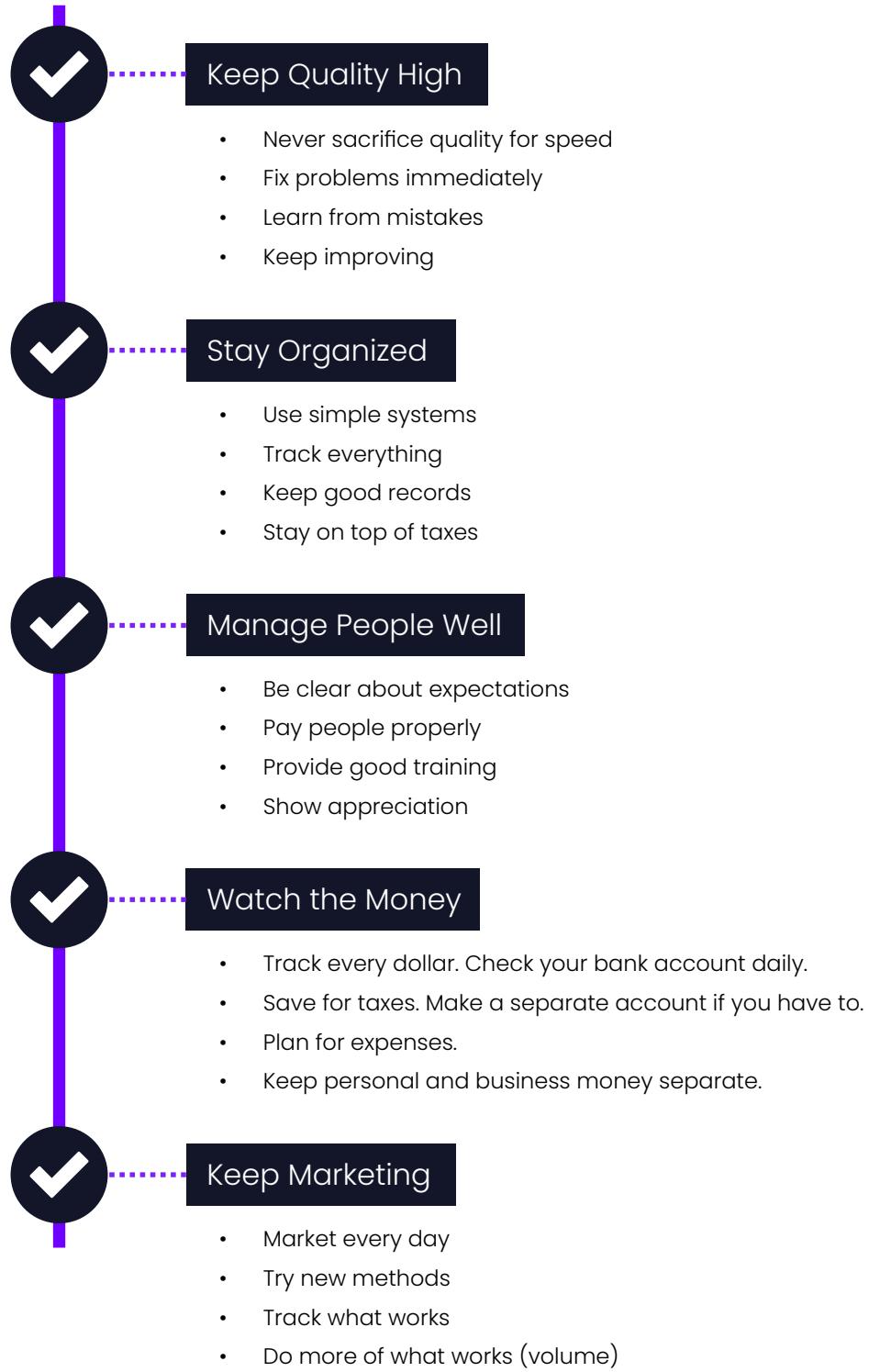
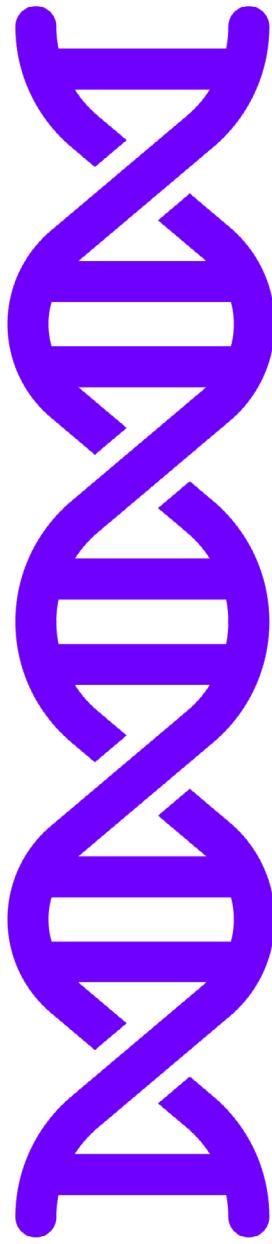
Money problems

Helper turnover

Feeling constantly behind

Too many emergencies

# THE KEYS TO SUCCESS:



# GRADUATING FROM STAGE 2

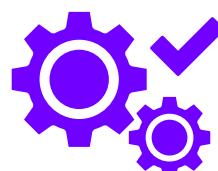
YOU'RE READY FOR STAGE 3 WHEN:



QUALITY IS CONSISTENT



NEW CUSTOMERS COME REGULARLY



SYSTEMS ARE WORKING



MONEY IS ORGANIZED



HELP IS RELIABLE



MARKETING IS STEADY

## REMEMBER

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This stage is about creating stability and systems. You're moving from "figuring it out" to "doing it right." It might feel slower than you want, but building these foundations is crucial.

## THE BIG PICTURE GOAL:

Your main goal in Stage 2 is to get more people to know about your business in a consistent way. You're not just serving customers anymore – you're building a real business that can grow.

# FINAL THOUGHTS

Stage 2 is where many businesses start to feel “real.” You’re not just selling something – you’re running a proper business. Take your time, build good habits, and focus on consistency. Every successful business went through this stage, so you’re on the right path!

This stage can feel like a juggling act, but it’s where you learn to be a true business owner. Stay focused on quality, keep marketing daily, and build systems that will support your growth. The more solid your foundation here, the easier your next stages will be.

# THIS IS WHAT'S COMING NEXT...

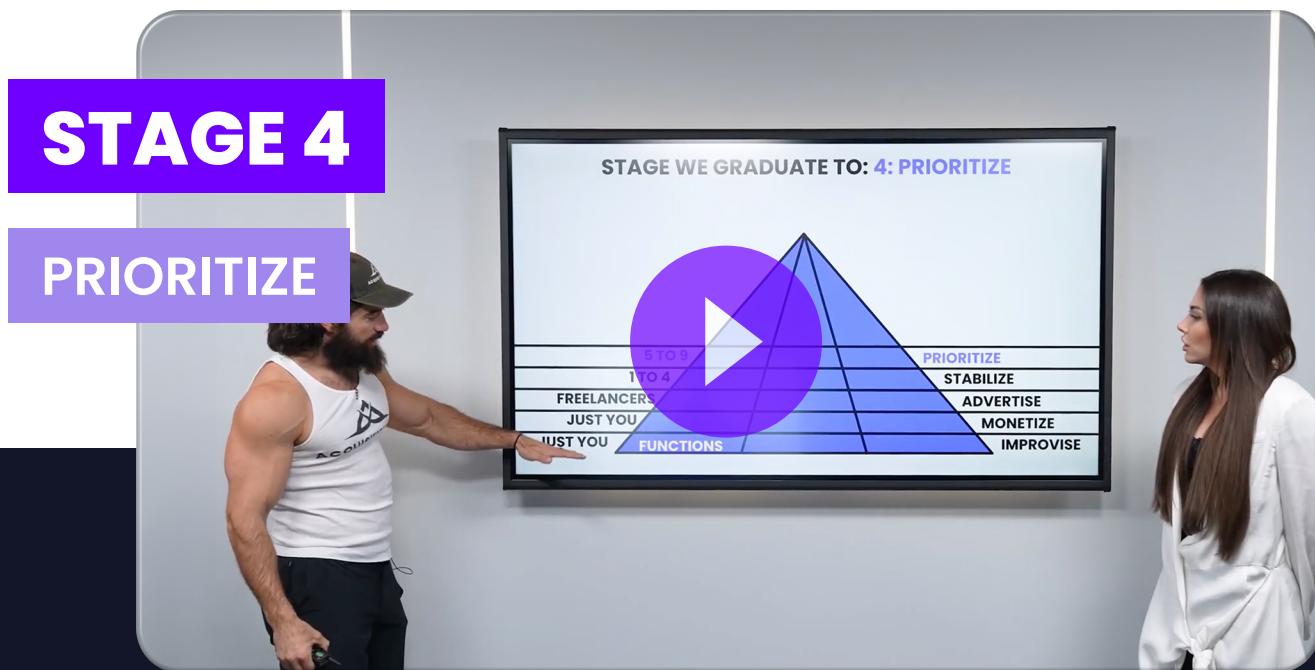


## STAGE 4: PRIORITIZE

# 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”

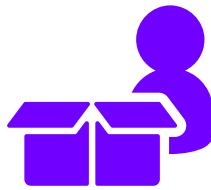
Welcome to having 5–9 employees! About 3 million businesses reach this level. This is when you change from being a “trainer” to becoming a real “manager.” You’ll have your first real team, with one layer of organization between you and the front-line workers. The big difference? You can’t do everything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

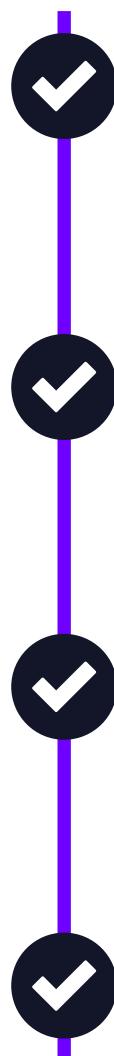
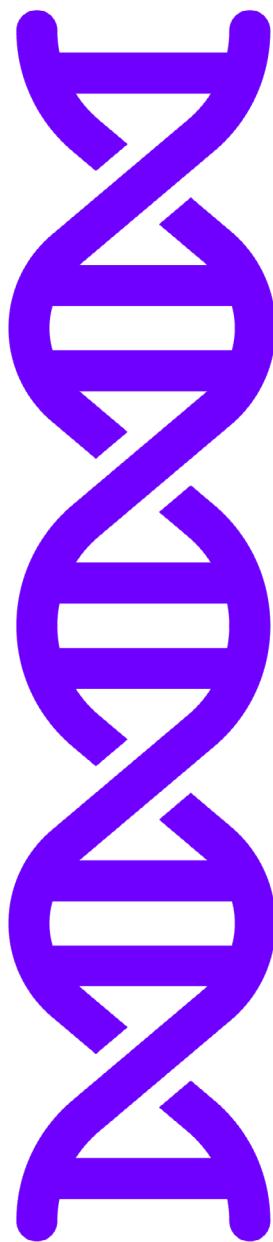


## Money Matters

- 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

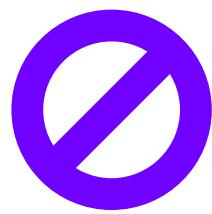
- Write an employee handbook
- Set up proper insurance
- Create basic processes for everything
- Start running your business like a real company

# THE BOTTOM LINE

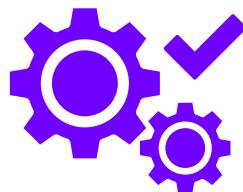
**STAGE 4 IS ALL ABOUT FOCUS AND PRIORITIES. YOU CAN'T SERVE EVERYONE, AND YOU CAN'T DO EVERYTHING. YOU NEED TO CHOOSE WHAT'S MOST IMPORTANT AND FOCUS ON THAT. THIS MEANS:**



PICKING  
YOUR IDEAL  
CUSTOMERS



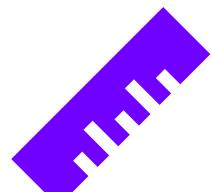
SAYING  
NO TO  
OTHERS



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

# DO YOU WANT TO SCALE TO THE NEXT STEP?



Over 24% of businesses get stuck here. There's too much for one person to do and the only way to reach the next level is to get help. If you want our advice on how to find a team for your business, check out one of our Scaling Workshops. You can grab a seat below.



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