

Growth Strategy Guide

Free Resource from Mission-Driven Momentum Podcast

Practical frameworks and templates for making strategic decisions about organizational growth—without breaking systems or burning out people.

GROWTH READINESS ASSESSMENT

Strategic Alignment

- ☐ Does this growth opportunity directly serve our core mission?
- ☐ Will this strengthen (not dilute) our organizational focus?
- ☐ If we explained this to our founders, would they immediately recognize how it advances our mission?
- ☐ Is this pulling us forward on our established path (not sideways into new territory)?

Demand Verification

- ☐ Are we currently turning people away or maintaining waitlists?
- ☐ Have we verified this demand through direct conversations with potential clients
- ☐ Is this demand sustained over time (6+ months), not temporary?
- ☐ Have we surveyed current clients about whether they would use/refer expanded services? (Needs Assessment/Feasibility Study)
- ☐ Have we looked at demand trends over time (not just one snapshot)?

Capacity Assessment

- ☐ Do we have the financial resources to start new programs or services without putting other programs or services into a negative financial position?
- ☐ Do we have staff with the right expertise for this work
- ☐ Do we have enough time/bandwidth to execute this excellently?
- ☐ Are our systems ready to handle increased volume?

- ☐ Do we have leadership bandwidth to guide this growth thoughtfully?
- ☐ If everyone is already working 50+ hour weeks, where will time for growth come from?

Wrong Reasons Check

Check any that apply. These shouldn't be your primary drivers:

- ☐ Our competitor is doing it, so we feel we should too
- ☐ Board members are pushing for it
- ☐ There's grant money available (even though it's not perfectly aligned)
- ☐ It would look impressive/make good presentations
- ☐ We're uncomfortable saying no to opportunities
- ☐ We haven't verified demand; we're just assuming

Assessment Summary

Count your checkbox answers (excluding Wrong Reason Checks):

- 11-13 Yes answers: You're likely ready. Proceed to Risk Management.
- 8-10 Yes answers: Address gaps first. Focus on areas with No or Maybe.
- Fewer than 8 Yes answers: Not ready yet. Strengthen foundation first.
- Any "Wrong Reasons" checked: Examine motivations carefully.

Most important: Be honest. Wishful thinking about capacity leads to broken systems and burned-out people.

RISK MANAGEMENT FRAMEWORK

Step 1: Identify the Worst-Case Scenario

Not the most likely scenario, but the absolute worst possible outcome. Think like Alabama planning a trick play—they know exactly what happens if it doesn't work.

If this growth initiative completely fails, what happens?

Financial impact: _____

Impact on core programs: _____

Impact on staff: _____

Impact on reputation: _____

Step 2: Assess Survivability

Based on the worst-case scenario above, can your organization survive?

- ☐ Yes—we could absorb this failure without cutting core programs
- ☐ Maybe—it would be painful but we'd survive
- ☐ No—this could seriously threaten organizational viability
- ☐ Unclear—we need more financial analysis

If you checked "No" or "Unclear," do not proceed without reducing risk substantially.

Step 3: Risk Reduction Strategies

Which strategies could reduce your risk to acceptable levels?

- ☐ Pilot program—start small, test assumptions, prove concept first
- ☐ Secure committed funding before beginning
- ☐ Build financial reserves to cover 6-12 months if revenue doesn't materialize

- ☐ Identify which current work you'll cut if this doesn't succeed
- ☐ Establish clear checkpoints where you'll evaluate and potentially stop
- ☐ Partner with another organization to share risk
- ☐ Phase implementation over 18-24 months instead of launching everything at once

Step 4: Decision Checkpoints

Establish clear points where you'll evaluate progress and decide whether to continue, adjust, or stop.

Checkpoint 1 (3 months): What must be true to continue?

Checkpoint 2 (6 months): What must be true to continue?

Checkpoint 3 (12 months): What must be true to fully commit/scale?

Commit now: We will honestly evaluate at each checkpoint and have permission to stop if metrics aren't met.

PILOT PROGRAM PLANNING TEMPLATE

Pilot Design

What exactly are we piloting?

Pilot size: _____ participants (small enough to manage, large enough to learn)

Pilot duration: _____ weeks/months (one complete cycle)

Pilot timeline: Start date _____ End date _____

Key Assumptions to Test

List 3-5 critical assumptions that must be true for this to work at scale:

1. _____

2. _____

3. _____

4. _____

5. _____

Success Metrics

What will we measure to determine if the pilot is successful?

Outcome metrics: _____

Process metrics: _____

Financial metrics: _____

Staff experience: _____

Participant satisfaction: _____

Decision Criteria

After the pilot, we will:

☐ Proceed to full launch if:

☐ Run another pilot with adjustments if:

☐ Stop and not pursue further if:

Learning Plan

How will we gather feedback?

☐ Weekly check-ins with staff

☐ Mid-pilot survey with participants

☐ End-of-pilot survey with participants

☐ Focus group or interviews

☐ Track quantitative data weekly

☐ Other: _____

Who will compile and analyze this data?

When will we meet to review results?

RUTHLESS PRIORITIZATION FRAMEWORK

Creating margin requires saying no to good opportunities so you have capacity for great ones. When you try to make everything a priority, nothing actually is a priority.

Step 1: List Everything

List every program, project, and ongoing commitment:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

(Continue on additional paper if needed. Organizations are often shocked by how long this list is.)

Step 2: Assess Each Item

For each item above, honestly answer:

- Does this directly advance our core mission? (Yes/No)
- Do we do this exceptionally well or just adequately? (Exceptional/Adequate/Poor)
- Would our most important stakeholders notice if we stopped? (Yes/No)
- Does this generate meaningful impact or revenue? (High/Medium/Low)

Create a spreadsheet with these questions as columns. Be brutally honest.

Step 3: Identify Your Top 2-3 Priorities

Based on your assessment, what are the most important things for the next 3-6 months?

Priority 1: _____

Why this matters: _____

Priority 2: _____

Why this matters: _____

Priority 3 (if needed): _____

Why this matters: _____

Step 4: Decide What to Delay, Delegate, or Delete

For everything NOT in your top priorities:

DELAY (good work that doesn't need to happen right now):

1. _____

2. _____

3. _____

DELEGATE (work that doesn't need senior leadership attention):

1. _____

2. _____

3. _____

DELETE (work that no longer serves your mission):

1. _____
2. _____
3. _____

Step 5: Protect Your Priorities

New opportunities will come up. Filter them through: "Does this directly serve one of our priorities?"

If no, decline or delay, no matter how good it sounds.

Practice saying:

- "That's a great opportunity, but we're focused on [priorities] right now."
- "We'd love to be involved, but we don't have capacity to do it excellently."
- "Let's revisit this when we've completed our current priorities."

CAPACITY AUDIT WORKSHEET

People Capacity

List each key staff member and their current time allocation:

Staff Member 1: _____

Current responsibilities:

Estimated hours per week: _____ (If 50+, they're maxed out)

Available capacity: ☐ None ☐ Minimal ☐ Some ☐ Significant

Staff Member 2: _____

Current responsibilities:

Estimated hours per week: _____

Available capacity: ☐ None ☐ Minimal ☐ Some ☐ Significant

If everyone is already at or over capacity, where will time for growth come from? Be specific.

Answer: _____

Systems Capacity

Assess your current systems:

Client/participant management:

☐ Working well ☐ Barely functional ☐ Broken

Can handle growth? ☐ Yes ☐ No ☐ Need to upgrade first

Scheduling and coordination:

☐ Working well ☐ Barely functional ☐ Broken

Can handle growth? ☐ Yes ☐ No ☐ Need to upgrade first

Billing and financial tracking:

☐ Working well ☐ Barely functional ☐ Broken

Can handle growth? ☐ Yes ☐ No ☐ Need to upgrade first

Communication (internal and external):

☐ Working well ☐ Barely functional ☐ Broken

Can handle growth? ☐ Yes ☐ No ☐ Need to upgrade first

Reality check: You cannot scale broken systems. If you marked "Barely functional" or "Broken" for any critical system, you must fix it before growing.

Financial Capacity

Estimated cost of growth initiative:

New staff salaries and benefits: \$_____

Systems/technology upgrades: \$_____

Marketing/outreach: \$_____

Space/facilities: \$_____

Program materials and supplies: \$_____

Professional development/training: \$_____

Other: \$_____

TOTAL: \$_____

Funding sources:

- ☐ Secured (money committed): \$_____
- ☐ Projected (hoped for but not committed): \$_____

Reality: Only count secured funding. Projected funding is hope, not capacity. If you don't have secured funding to cover 6-12 months, you're betting organizational stability on hoped-for revenue.

Final Assessment

Based on this audit, do we have genuine capacity to pursue this growth excellently?

- ☐ Yes—we have people, systems, money, and leadership bandwidth
- ☐ Maybe—we have some capacity but need to address gaps first
- ☐ No—we're not ready and need significant foundation work

If you checked "Maybe" or "No," what specific work must happen before you're ready?

1. _____
2. _____
3. _____

Remember: "Not ready yet" isn't failure. It's strategic wisdom. Better to build capacity first than to break systems and burn out people pursuing growth you can't sustain.

NEED MORE SUPPORT?

Podcast: Listen to Episode 7 at missiondrivenpod.com

Blog: Read the companion post for deeper examples and stories

Consulting: Want help choosing and implementing the right growth strategy for your organization? Contact The Scanland Group at contact@thescanlandgroup.com or visit thescanlandgroup.com

From The Scanland Group:

*Keep leading with heart, keep showing up with purpose,
and keep creating a world where everyone belongs.*