

Scalability Readiness Checklist

Use this checklist to assess how ready your business is to scale. Tick off what you already have in place, and note any actions to take next. Be honest – this is for your own clarity and planning and will help you prioritize what matters most.

1. Clear and Focused Offer

Statement	Yes	No	Action to Take
I can describe what I sell in one sentence	<input type="checkbox"/>	<input type="checkbox"/>	
My pricing is consistent and profitable	<input type="checkbox"/>	<input type="checkbox"/>	
I offer standardised packages or products	<input type="checkbox"/>	<input type="checkbox"/>	
Customers understand what I offer straight away	<input type="checkbox"/>	<input type="checkbox"/>	

2. Documented Processes

Statement	Yes	No	Action to Take
I have repeatable steps for common tasks (e.g. invoicing, fulfilment)	<input type="checkbox"/>	<input type="checkbox"/>	
I've written down at least one core workflow	<input type="checkbox"/>	<input type="checkbox"/>	
Someone else could follow my instructions to complete a task	<input type="checkbox"/>	<input type="checkbox"/>	
I use templates or checklists to save time	<input type="checkbox"/>	<input type="checkbox"/>	

3. Capacity for Growth

Statement	Yes	No	Action to Take
I could handle double the number of enquiries next week	<input type="checkbox"/>	<input type="checkbox"/>	

I've blocked out regular time for business development

I have limits in place for custom or high-effort requests

I know who to call on if I need help (freelancers, VAs etc.)

4. Tools and Automation

Statement	Yes	No	Action to Take
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I use at least one tool to automate admin or marketing	<input type="checkbox"/>	<input type="checkbox"/>	
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My payment/invoicing system is reliable and easy to use	<input type="checkbox"/>	<input type="checkbox"/>	
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I can book clients or take orders without constant back-and-forth	<input type="checkbox"/>	<input type="checkbox"/>	
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I've reviewed my tech stack in the past 3 months	<input type="checkbox"/>	<input type="checkbox"/>	
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5. Financial and Mindset Readiness

Statement	Yes	No	Action to Take
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I know how much I earn, spend, and keep each month	<input type="checkbox"/>	<input type="checkbox"/>	
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My prices allow room for investment in help or tools	<input type="checkbox"/>	<input type="checkbox"/>	
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I've set goals for the next 3-6 months	<input type="checkbox"/>	<input type="checkbox"/>	
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I believe it's possible to grow without burning out	<input type="checkbox"/>	<input type="checkbox"/>	
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