LEAD & SCALE

GROWTH PLANNING TOOLKIT

Choose the right growth path, align capacity, and convert ambition into disciplined execution.

2026 EDITION | PRACTICAL BUSINESS RESOURCE

01 / GROWTH MANDATE

Define the Growth Outcome

Choose the business result, planning horizon, customer, owner, and boundaries. Growth should increase durable enterprise value—not merely activity or complexity.

Planning decision	Definition
Business / division	
Planning horizon	
Growth objective	
Priority customer / market	
Growth measure	
Current baseline	
Target result	
Executive sponsor	
Growth-plan owner	
Investment ceiling	

Growth thesis: We will grow by...

_____

_____

What growth will not compromise

_____

02 / CURRENT POSITION

Establish the Evidence Base

Review current performance, customer value, economics, capabilities, constraints, and risk before choosing the next growth move.

Business dimension	Current evidence	Strength / advantage	Constraint / concern
Revenue and growth trend			
Customer acquisition			
Retention and expansion			
Offer performance			
Gross margin / cash			
Brand and market position			
Operating capacity			
Technology and data			
Leadership and team			
Risk / compliance			

The most important fact about the current business

_____

The constraint that most limits growth today

_____

03 / GROWTH OPTIONS

Compare the Available Paths

Evaluate growth paths by customer value, strategic fit, evidence, economics, capability, time, and risk. Select deliberately rather than pursuing every opportunity.

Growth path	Customer value	Evidence	Economics	Capability fit	Time	Risk	Decision
Increase penetration in current market							Pursue / Test / Defer / Stop
Improve conversion or pricing							Pursue / Test / Defer / Stop
Increase retention / expansion							Pursue / Test / Defer / Stop
Launch a new offer							Pursue / Test / Defer / Stop
Enter a new customer segment							Pursue / Test / Defer / Stop
Enter a new geography							Pursue / Test / Defer / Stop
Add a channel or partnership							Pursue / Test / Defer / Stop
Acquire a business or capability							Pursue / Test / Defer / Stop
License / franchise / platform model							Pursue / Test / Defer / Stop

Selected primary growth path and rationale

Secondary option to test without distracting the core plan

04 / CUSTOMER & OFFER

Strengthen the Engine of Growth

Clarify the target customer, buying situation, value, offer, proof, price, and experience required to support repeatable growth.

Growth question	Decision / evidence
Priority customer or account type	
Problem, trigger, or desired progress	
Outcome customers value most	
Offer and scope	
Differentiation and proof	
Price and commercial structure	
Primary objections / barriers	
Customer journey changes required	
Retention / expansion opportunity	
Maximum responsible demand	

Customer evidence still required

05 / MARKET & CHANNELS

Build a Repeatable Route to Customers

Choose channels according to audience access, economics, conversion quality, control, scalability, and brand fit.

Channel	Role	Audience fit	Current result	Cost / effort	Scale potential	Decision
Organic search / content						Invest / Test / Maintain / Stop
Email / existing audience						Invest / Test / Maintain / Stop
Social / community						Invest / Test / Maintain / Stop
Paid media						Invest / Test / Maintain / Stop
Direct sales / outreach						Invest / Test / Maintain / Stop
Partners / affiliates						Invest / Test / Maintain / Stop
Events / speaking						Invest / Test / Maintain / Stop
Marketplace / retail						Invest / Test / Maintain / Stop
Public relations / media						Invest / Test / Maintain / Stop

Growth funnel assumptions

Stage	Current	Target	Key improvement
Reach / audience			
Leads / opportunities			
Qualified			
Customers			
Retained / expanded			

06 / ECONOMICS

Confirm the Growth Model Creates Value

Translate the growth path into volume, revenue, margin, cash, investment, payback, and sensitivity assumptions.

Economic measure	Current	Growth assumption	Target	Evidence / source
Average customer value				
Gross margin				
Customer acquisition cost				
Conversion rate				
Retention / repeat rate				
Sales cycle				
Delivery / service cost				
Working-capital need				
Payback period				
Customer lifetime value				

Scenario summary

Scenario	Revenue	Gross profit	Investment	Cash impact	Decision
Conservative					
Base					
Stretch					

07 / CAPACITY & SYSTEMS

Determine What Must Scale

Identify which processes, systems, suppliers, facilities, data, and service capabilities must change before demand increases.

Capability area	Current capacity	Required capacity	Gap / risk	Scale action	Owner
Sales / conversion					
Onboarding					
Production / fulfillment					
Customer support					
Quality control					
Technology / integrations					
Data / reporting					
Suppliers / inventory					
Facilities / equipment					
Finance / controls					

- ☐ Capacity targets reflect realistic demand scenarios.
- ☐ Critical systems are tested before volume increases.
- ☐ Quality and customer experience standards are protected.
- ☐ Contingencies exist for supplier, staffing, system, and cash constraints.

08 / LEADERSHIP & ORGANIZATION

Build the Team Required for the Next Stage

Define the roles, decision rights, skills, structure, management rhythm, and leadership behaviors required to support greater scale.

Leadership / team need	Current state	Required state	Decision / action	Owner	Due
Executive ownership					
Functional leadership					
Role clarity					
Decision rights					
Management capability					
Specialist expertise					
Hiring / contractor need					
Delegation / span of control					
Performance measures					
Meeting / review rhythm					

Founder or executive responsibility that must be delegated

Leadership capability that must be strengthened first

09 / GROWTH RISKS

Protect the Core While Expanding

Identify how growth could weaken cash, quality, culture, service, controls, compliance, brand, or strategic focus.

Growth risk	Likelihood	Impact	Early signal	Prevention	Contingency	Owner

Growth guardrails

- ☐ Minimum cash, margin, service, and quality standards are defined.
- ☐ Growth does not depend on uncontrolled founder or team workload.
- ☐ Customer commitments do not exceed delivery capability.
- ☐ Legal, privacy, employment, tax, and regulatory obligations scale with the plan.

10 / GROWTH SCORECARD

Define the Measures That Govern Decisions

Use a balanced scorecard covering demand, conversion, customer value, economics, capacity, quality, people, and risk.

Measure	Definition	Baseline	Target	Source	Cadence	Owner	Threshold / action
Qualified demand							
Conversion							
Revenue growth							
Gross margin							
Acquisition cost							
Retention / expansion							
Customer experience							
Delivery capacity							
Team capacity							
Cash / runway							

Decision rules

Signal	Required response
Ahead of target	Protect quality; scale only when capacity and economics remain credible.
On target	Maintain execution and address emerging constraints.
Below target	Diagnose customer, offer, channel, conversion, or capacity cause.
Critical threshold	Stop, reduce, or restructure the growth initiative.

11 / STRATEGIC INITIATIVES

Convert the Growth Path into Owned Work

Select the few initiatives that directly create the desired result or remove the binding constraint. Avoid an excessive portfolio of disconnected projects.

Initiative	Growth contribution	Required result	Owner	Investment	Due	Success evidence

Initiative that receives the greatest leadership attention

Initiative to defer or stop to protect focus

12 / 90-DAY GROWTH PLAN

Create the First Execution Cycle

Use the first 90 days to validate the growth thesis, remove the primary constraint, build required capability, and establish measurable momentum.

Period	Priority outcome	Critical actions	Owner	Evidence / measure
Days 1-30				
Days 31-60				
Days 61-90				

Weekly commitment map

Week	Primary result	Owner	Status
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			

13 / REVIEW & DECISIONS

Run the Growth Operating Rhythm

Review results, constraints, assumptions, risks, and decisions at a cadence appropriate to the investment and speed of change.

Review	Purpose	Participants	Cadence	Required output
Weekly execution	Commitments, obstacles, decisions			
Growth scorecard	Performance and thresholds			
Customer / market evidence	Assumptions and learning			
Financial review	Economics, cash, investment			
Capacity / quality review	Operational readiness			
Executive growth review	Portfolio and strategic decisions			

Decision log

Date	Decision	Evidence / rationale	Owner	Follow-up

Decision that must be made before the next review

14 / REFERENCE NOTES

Use Guidance

Build the growth plan with leadership, finance, marketing, sales, operations, technology, and customer-facing teams. Update assumptions when evidence changes, while protecting strategic focus.

Recommended working sequence

Step	Working action
01	Define the growth mandate, horizon, target, boundaries, and owner.
02	Establish the current evidence base and identify the binding constraint.
03	Compare growth paths and select one primary thesis.
04	Align the customer, offer, channels, economics, and required capacity.
05	Build the leadership, systems, risk controls, and growth scorecard.
06	Select strategic initiatives and execute the first 90-day cycle.
07	Review results, update assumptions, and choose the next growth decision.

Final growth-plan quality check

- ☐ The growth objective is measurable and evidence-based.
- ☐ The chosen path creates customer and enterprise value.
- ☐ Economics, cash, and investment assumptions are explicit.
- ☐ Capacity and leadership scale before commitments exceed capability.
- ☐ Guardrails protect quality, culture, customers, and the core business.
- ☐ Initiatives are few, owned, funded, and measurable.
- ☐ The review rhythm leads to explicit growth decisions.

Important: This toolkit provides general business-planning guidance. Confirm financial, legal, employment, privacy, safety, accessibility, regulatory, contractual, tax, and other requirements for your business and markets.

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