



5 PHASES OF SCALING

THE PATHWAY TO VISIONARY

YOU KNOW YOU'RE HERE WHEN:

- You are the product, the sales team, and the support desk
- A vacation feels impossible, or guilty
- Revenue stops when you stop
- You approve everything before it goes out
- Your team waits on you more than moves without you
- You're busier than before you had help
- Meetings feel productive but problems keep recurring
- Your team is loyal but unclear on priorities
- You're still the answer to almost every question
- Your team brings you solutions, not problems
- Revenue grows even when you step away
- You're energized by your work again
- The company grows with or without your daily presence
- Your team leads from shared values, not your approval
- You spend most of your time doing what only you can do

1 PHASE 1 • THE SEEKER

You are the business. Every client, every deliverable, every dollar runs through you. The vision lives in your head, and in your hands.

2 PHASE 2 • THE PIONEER

You've made your first hires and felt the relief. Every decision still lands on your desk. You're delegating tasks but not yet trusting outcomes.

3 PHASE 3 • THE RINGLEADER

You have a team and a lot of moving parts. You're building systems and still putting out fires. This is where burnout can happen. The business is running you, not the other way around.

4 PHASE 4 • THE CO-CREATOR

The magic is shifting. Your leaders own their divisions, drive revenue, and innovate without waiting on your answer. You're building alongside a team as invested in the mission as you are.

5 PHASE 5 • THE VISIONARY

You've built something that runs brilliantly without your daily involvement. Your role now is to protect the vision, inspire the culture, and think ten steps ahead. This is what you built it all for.

REFLECTION

Where am I now?

PHASE ____

Where do I want to be in 12 months?

PHASE ____

What's keeping me from moving forward?

My committed next move: