



Readiness Tools

THE READINESS SERIES • BOOK 1

Scale Readiness Toolkit

**Free companion to
The Scale Readiness Ladder
by Paul Wakefield**

Every worksheet, checklist and gate check
from the book, ready to print and fill in.

THE SCALE READINESS LADDER

Build in this order. Every rung before the next.

readinesstools.com/scale-toolkit

What is inside

This toolkit goes with the book *The Scale Readiness Ladder*. The tools follow the book, rung by rung, in the same order. Print the pages you need and write in the boxes.

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The book: The Scale Readiness Ladder by Paul Wakefield, Founder of Readiness Tools. The Readiness Series, Book 1.

Free Scale Readiness Assessment: scalereadinesslab.com

The Financial Snapshot

Chapter 1: Know Your Numbers Before You Move Anything (and Appendix D, Exercise 1)

Complete this now. Write “unknown” where you do not know the answer. Every unknown is a gap with a specific action required to close it.

1. Your numbers today

Number	Your figure	Known or unknown?
Revenue last month (£)		
Total costs last month (£)		
Gross margin (%)		
Current cash (£)		
Monthly burn (£)		
Runway (months)		
Customer Acquisition Cost, CAC (£)		
Customer Lifetime Value, LTV (£)		
LTV:CAC ratio (: 1)		

2. The three numbers that tell the truth

Gross margin	The percentage of revenue left after paying direct delivery costs. It shows whether your model can ever be profitable at scale.
Burn rate	The rate at which the business uses cash each month.
Runway	Cash reserves divided by monthly burn rate. £120,000 in the bank with £20,000 monthly costs equals six months.

Runway sum	Your figures
Cash in the bank (£)	
Monthly burn (£)	
Cash ÷ monthly burn = runway (months)	

3. Unit economics

CAC	All sales and marketing spend divided by the number of new customers won.
LTV	The total gross profit one customer brings in over their whole relationship with you.
LTV:CAC	Above 3:1, the model works. Below 3:1, scaling makes it worse.

Unit economics sum	Your figures
Sales and marketing spend in the period (£)	
New customers won in the period	
CAC = spend ÷ new customers (£)	
Gross profit per customer over the relationship, LTV (£)	
LTV ÷ CAC = ratio (: 1)	

4. The last three months

	Month 1	Month 2	Month 3
Revenue (£)			
Total costs (£)			
Gross margin (%)			
Net profit or loss (£)			
Cash at month end (£)			
Burn (£)			

5. The weekly cash question

Profit and cash are not the same thing. A profitable business can run out of cash. Ask this every week: what is the gap between what is coming in and what is going out?

Next	Coming in (£)	Going out (£)	Gap (£)	What we will do
30 days				
60 days				
90 days				

6. Close the gaps

How many unknowns did you have?

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What are the three most urgent gaps, and what will you do about each one this week?

--

The Monthly Financial Rhythm

Chapter 2: The Financial Habits That Change Everything

Financial clarity is not a document. It is a discipline. Four parts, every month, about two hours. Use one copy of this sheet each month.

Month	
Date of review	
Who was in the review	

1. Close (by the end of week one)

- ☐ All transactions reconciled
- ☐ All invoices raised
- ☐ All costs recorded

2. Review

- ☐ P&L produced
- ☐ P&L reviewed against budget and the prior month
- ☐ Gross and net margins calculated
- ☐ Cash position reviewed

Write three sentences.

What changed	
What surprised you	
What the trend suggests	

3. Act

Pick the one or two most important financial actions for the coming month. Give each an owner and a deadline.

Action	Owner	Deadline

4. Look forward

Update the cash flow forecast for the next three months.

	Next month	Month 2	Month 3
Cash in (£)			
Cash out (£)			
Closing cash (£)			

Where are the tight spots?

--

What actions prevent the next cash problem before it becomes a crisis?

--

5. Check for the two traps

Question	Yes	No
Revenue Mirage trap: when we looked at revenue, did we also ask "what did it cost and what remains?"	☐ Yes	☐ No
Outsourced ignorance trap: do I understand what these numbers mean myself, not just what my accountant reports?	☐ Yes	☐ No

TOOL 3 • RUNG 1: ACCOUNTING

Accounting Gate Check

Chapter 1: Know Your Numbers Before You Move Anything (and Appendix B)

Can you read your P&L and know your burn rate today? Answer the six questions below without checking anything. Time yourself.

Question	My answer from memory	Correct?
Last month's revenue		
Last month's gross margin		
Current cash position		
Monthly burn rate		
Months of runway		
Are margins trending better or worse than three months ago?		

Time taken	
------------	--

Gate Check

Can you read your P&L and know your burn rate today?	
PASS Answer all six financial questions from memory in under two minutes.	NOT READY If you can't, stop. Do not climb. The foundation is not ready.
Our result: ☐ Pass ☐ Not ready	

If not ready: what will you do to close the gap, and when will you test this gate again?

--

The Founder Gravity Audit

Chapter 3: Building What Doesn't Need You (and Appendix D, Exercise 2)

Founder Gravity is the pull that draws every important decision, problem and critical moment back to the founder. Mark each activity honestly.

Activity	Primarily me? (Y/N)	Should it be? (Y/N)	What would enable handover?
Approving client deliverables			
Client relationship management			
Financial decisions			
Hiring decisions			
Marketing content			
Sales conversations			
Operational problem-solving			

Every "Primarily me: Yes / Should it be: No" is a point of Founder Gravity.

What is the single highest-priority point of Founder Gravity?

What specifically needs to be in place to release it?

Process Documentation Template

Chapter 3: Building What Doesn't Need You and Chapter 4: The Documentation Standard (and Appendix C)

A system is a documented, repeatable process for producing a consistent outcome. Vague documentation produces vague execution. Specific documentation produces consistent outcomes.

1. Your critical path

Don't try to document everything at once. Start with delivery, end to end, from the moment a sale closes to the moment the customer's need is fully met. Then client onboarding. Then internal operations.

Order	Process	Owner	Documented?
1	Core delivery		
2	Client onboarding		
3			
4			
5			
6			

2. One process, documented

Use one copy of this page for each process.

Name and purpose (one or two sentences)	
Owner (a named person)	
What success looks like (the what)	

Step	Who does it	Action (start with a verb)	Tool used	Decision rule, if any
1				
2				
3				
4				
5				
6				
7				
8				

Quality standard (specific enough to know if it was met)	
Common errors and how to avoid them	
Escalation: what to do when something falls outside this process	
Date last updated	

Systems Gate Check

Chapter 3: Building What Doesn't Need You (and Appendix B)

Imagine removing yourself from the business for three months: no email, no calls. Could the core operations continue, to the required standard, with only the documentation you have built?

Core process	Documented?	Could a capable new person run it from the document alone?

Gate Check

Could someone else run your core operations from documentation alone?

PASS
A capable new person executes each core process to the required standard using only the documentation, without guidance from the founder or experienced team members.

NOT READY
Critical processes would halt because no one knows how to execute them without you.

Our result: ☐ Pass ☐ Not ready

Which process would halt first without you, and what will you document next?

Role Definition Template

Chapter 5: Hiring Into Systems, Not Into Chaos (and Appendix C)

Define the role before you write the advert. Not a job title and a list of tasks: a complete description of what the role exists to achieve.

Role title	
Reports to	
Role purpose (one sentence): what does this role fundamentally exist to do?	

Key outcomes (three to five)

The results that represent excellent performance. Outcomes, not activities. For example: "Maintain a client retention rate above 90%."

Key outcome	How it will be measured
1	
2	
3	
4	
5	

Required competencies

Specific enough to assess. "Strong communication" is too vague. "Ability to write clear, professional client-facing communications without errors" can be assessed.

Competency	How we will assess it

Structured interview

Every candidate answers the same questions in the same order, judged against the same criteria.

Question	What a strong answer shows
1	
2	
3	
4	
5	

Onboarding

Which documented processes will they learn from first?	
What happens on their first day?	

TOOL 8 • RUNG 3: PEOPLE

People Gate Check

Chapter 5: Hiring Into Systems, Not Into Chaos, Chapter 6: Performance, Culture, and the Hard Truths (and Appendix B)

Are your people running systems, or are you still running everything yourself?

What passing requires

Question	Yes	No
A team is in place with clearly defined roles, running core systems without daily founder involvement.	☐ Yes	☐ No
Performance is managed against clear metrics, based on the outcomes set when each role was created.	☐ Yes	☐ No
A management structure runs without founder bottlenecks.	☐ Yes	☐ No

Gate Check

Are your people running systems, or are you still running everything yourself?	
PASS Core operations continue for a full working week without any founder operational involvement. The team functions with genuine, unhesitating authority.	NOT READY Problems still flow back to you and the team waits for you to decide.
Our result: ☐ Pass ☐ Not ready	

The culture you actually have

Culture is not what you say. It is what you do. The founder who says they value ownership but second-guesses every decision creates a culture of dependency.

What we say we value	What my behaviour actually shows

Which difficult performance conversation am I avoiding?

--

The Three Marketing Questions

Chapter 7: Building Demand That Doesn't Need You

Before channel, message and budget, answer three more basic questions. Answer them with real precision and marketing becomes much simpler.

Who specifically is this business for?

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What industry?	
----------------	--

What stage?	
-------------	--

What problem are they experiencing right now?	
---	--

What have they already tried that hasn't solved it?	
---	--

What is the single most important thing this business offers them?

--

Why would a rational, sceptical person believe it? What evidence makes the claim credible rather than aspirational?

--

The Positioning Draft

Chapter 8: Positioning and the Content Engine (and Appendix D, Exercise 3)

Positioning names the audience, describes the problem, explains the unique mechanism and says why this is better than the alternatives. If it could describe anyone, it describes no one.

Who the audience is	
The problem they have	
Our unique mechanism (how we solve it)	
Why this is better than the alternatives	

Write the sentence

"We help _____ who _____ to _____ by _____, unlike _____ which _____."

Draft 1

Draft 2 (after testing it with people who know the business honestly)

Test it. If any answer is no, revise.

Question	Yes	No
Is it specific enough that your ideal customer would recognise themselves in it?	☐ Yes	☐ No
Is it different enough that a competitor could not claim it equally?	☐ Yes	☐ No
Is it about the outcome rather than the process?	☐ Yes	☐ No

The Content Engine Plan

Chapter 8: Positioning and the Content Engine and Chapter 12 (and Appendix C)

Thought leadership is a long game, and long games need structure. The system has three parts: idea capture, a publishing rhythm you can keep up, and active distribution.

1. Idea capture

Where we capture ideas (one reliable place)	
--	--

Date	Idea	Where it came from (client call, market, team meeting)

2. Publishing rhythm

A weekly newsletter kept up for two years builds more authority than a daily one that stops after three weeks.

What we publish	
How often	
Who owns it	

3. Cornerstone content

Three long-form, substantive articles answering the most important questions your target audience is asking.

Question our audience is asking	Working title	Published (date)
1		
2		
3		

4. Distribution and PR targets

Publication without distribution is a tree falling in a forest. List five podcasts, publications or speaking opportunities that reach your audience. Write a specific pitch for each.

Podcast, publication or event	Pitch angle	Sent (date)
1		
2		
3		
4		
5		

Marketing Gate Check

Chapter 7: Building Demand That Doesn't Need You (and Appendix B)

Is qualified demand arriving consistently without your direct involvement?

Qualified	Matching your ideal customer profile.
Consistently	Reliably, not now and then.
Without your direct involvement	Not dependent on the founder's personal outbound activity.

Where enquiries came from (last 3 months)	Number	Qualified?
Founder's personal network		
Content and search		
PR and speaking		
Referrals		
Other		

Gate Check

Is qualified demand arriving consistently without your direct involvement?	
PASS Qualified inbound enquiries arriving reliably from sources other than the founder's personal network, at volume sufficient to sustain sales targets.	NOT READY Demand depends on the founder's own outreach, or arrives only now and then.
Our result: ☐ Pass ☐ Not ready	

Sales Playbook Framework

Chapter 9: Building the Revenue Engine (and Appendix C)

The sales playbook is the system document for the sales function. It is used in training, referred to in live situations and updated as the business learns what works.

1. Ideal Customer Profile

Industry	
Company size	
Geography	
Seniority of the buyer	
What specific problem are they experiencing right now?	
What have they tried before that hasn't worked?	
What triggers their decision to seek a solution now?	

2. Value proposition

What the customer gets (outcomes, not features)	
What they could not get elsewhere	
Why it matters to them right now	

3. The sales process in detail

Stage	Goal	What to do	Materials	Questions to ask
First contact				
Close				

4. Objection handling library

Objection	Our documented response
"Your price is too high."	

5. Activity and outcome metrics

Metric	Target	Actual
Prospects contacted		
Discovery calls held		
Proposals sent		
Conversion rate at each stage (%)		
Average deal size (£)		
Average sales cycle (days)		

Sales Gate Check

Chapter 9: Building the Revenue Engine (and Appendix B)

Do you have a repeatable sales process that closes without founder dependency? Look for three pieces of evidence.

Evidence	Yes / No	Proof
Documented revenue won by team members without founder involvement		
An active, accurately kept CRM		
A sales playbook used in real onboarding that has produced measurable results		

Gate Check

Do you have a repeatable sales process that closes without founder dependency?	
PASS Documented revenue from team members without founder sales involvement. Active CRM. Sales playbook used in actual onboarding, producing measurable results.	NOT READY The founder still has to close the deals, or the playbook is not used in practice.
Our result: ☐ Pass ☐ Not ready	

Where do I still step in when a deal stalls, and what would let me coach instead of rescue?

Twelve Patterns That Break Scaling Businesses

Chapter 10: When All Five Rungs Are in Place

These twelve patterns are the most common, the most predictable and the most preventable. Tick every pattern you recognise. Then pick the one costing you most and start its response this week.

- ☐ **Pattern 1: The Midnight CEO**
The founder personally approves invoices, responds at 11pm, cannot take a holiday without the business misfiring.
Root cause: Missing Systems rung, Founder Gravity at its most extreme.
Response: Systems audit immediately.

- ☐ **Pattern 2: The Revenue Mirage**
Record revenue month celebrated while the bank balance declines; margins and burn rate rarely discussed.
Root cause: Missing Accounting rung, confusing the scoreboard with the game.
Response: Monthly financial review, starting this week.

- ☐ **Pattern 3: The Chaotic Scale**
Headcount doubles. Productivity doesn't. Problems multiply. The founder is somehow busier than before.
Root cause: Hiring before systems.
Response: Stop hiring until core processes are documented.

- ☐ **Pattern 4: The Marketing Flood**
Marketing generates impressive leads. Revenue rises. Then delivery breaks and complaints spike.
Root cause: Marketing before Systems and People.
Response: Pause marketing spend. Fix delivery. Return with the infrastructure to convert demand into positive client experiences.

- ☐ **Pattern 5: The Vanity Dashboard**
The founder can cite social media following and website traffic, but not gross margin, CAC or churn rate.
Root cause: Tracking metrics that protect ego rather than expose weakness.
Response: Build a financial and operational dashboard this week.

- ☐ **Pattern 6: The Relationship Dependency**
A key client relationship is entirely owned by the founder. If the founder left, the client would likely follow.
Root cause: Client management systems never built.
Response: Bring team members into key relationships immediately, with explicit framing.

-
- ☐ **Pattern 7: The Premature Pivot**
The business pivots in response to short-term pressure before the current model has been properly tested.
Root cause: No financial clarity, so you cannot tell a model that isn't working from one that hasn't had the right infrastructure.
Response: Run the unit economics before pivoting.

 - ☐ **Pattern 8: The Expertise Bottleneck**
The founder is the only person who fully understands the core product or service.
Root cause: Domain expertise never systematised, Founder Gravity in the knowledge layer.
Response: Treat the founder's domain knowledge as the most important documentation project in the business.

 - ☐ **Pattern 9: The Sales-Delivery Gap**
Sales are growing. Delivery is struggling. Client expectations are routinely misaligned with actual outcomes.
Root cause: Sales and delivery are not connected through a structured handover.
Response: Create a structured handover process between sales and delivery.

 - ☐ **Pattern 10: The Hired Too Senior Trap**
The business hires a senior leader before having the systems to support them. They leave within a year.
Root cause: Hiring the person before building the environment.
Response: Build the infrastructure before hiring senior leaders to operate within it.

 - ☐ **Pattern 11: The Founder Re-insertion Loop**
The founder delegates a function, something goes slightly wrong, and they take it back. The team learns their authority is conditional.
Root cause: Tolerance for imperfection in delegated work is too low.
Response: Step back in only when a client relationship is at genuine risk or a legal threshold is crossed. Everything else is coaching.

 - ☐ **Pattern 12: The Infinite Preparation Loop**
The founder understands the framework perfectly, has planned each rung for six months, and nothing has been built.
Root cause: The belief that more preparation will reduce the discomfort of building.
Response: Begin today.
-

TOOL 16 • PUT THE LADDER TOGETHER

The Scale Readiness Assessment

Chapter 10: When All Five Rungs Are in Place

Rate yourself honestly on every item. Circle or tick one score for each line, then add up each rung.

1	Not in place
2	Partially in place
3	Fully in place

Accounting (8 items, max 24)	1	2	3
P&L legibility	☐	☐	☐
Gross margin visibility	☐	☐	☐
Burn rate known	☐	☐	☐
Runway calculated	☐	☐	☐
Accounting software current	☐	☐	☐
Monthly financial review in place	☐	☐	☐
CAC and LTV calculated	☐	☐	☐
12-month budget active	☐	☐	☐
Total for this rung (max 24)			

Score below 20: Accounting rung is your priority.

Systems (7 items, max 21)	1	2	3
Core delivery process documented and tested	☐	☐	☐
Client onboarding documented	☐	☐	☐
Central knowledge base in place	☐	☐	☐
Named process owners	☐	☐	☐
Business can run three months without daily founder involvement	☐	☐	☐
New hires trained from documentation	☐	☐	☐
Documentation is a cultural default	☐	☐	☐
Total for this rung (max 21)			

Score below 17: Do not scale headcount until this is built.

People (6 items, max 18)	1	2	3
Clearly defined roles with documented descriptions	☐	☐	☐
Team running systems without daily founder involvement	☐	☐	☐
Active performance management	☐	☐	☐
Documented onboarding	☐	☐	☐
Management structure without founder bottlenecks	☐	☐	☐
Culture lived consistently with stated values	☐	☐	☐
Total for this rung (max 18)			

Score below 15: People rung requires attention.

Marketing (7 items, max 21)	1	2	3
Clear positioning statement	☐	☐	☐
Content strategy and consistent publishing	☐	☐	☐
Organic traffic and inbound enquiries	☐	☐	☐
Active PR programme	☐	☐	☐
Consistent brand	☐	☐	☐
SEO strategy generating target keyword visibility	☐	☐	☐
Qualified inbound demand arriving without direct founder outreach	☐	☐	☐
Total for this rung (max 21)			

Score below 17: Marketing engine not operational.

Sales (7 items, max 21)	1	2	3
Documented sales process	☐	☐	☐
Process executed by team members other than the founder	☐	☐	☐
Active maintained CRM	☐	☐	☐
Sales playbook used in actual training	☐	☐	☐
Revenue forecasting from pipeline data	☐	☐	☐
Sales metrics measured and reviewed	☐	☐	☐
New revenue generated without founder closing every deal	☐	☐	☐
Total for this rung (max 21)			

Score below 17: Founder dependency for revenue generation remains.

Rung	Score	Max	Below this, it needs work
Accounting		24	20
Systems		21	17
People		18	15
Marketing		21	17
Sales		21	17

Your lowest-scoring rung is your priority. Build from the bottom. The ladder only holds if every rung is in place.

My lowest-scoring rung	
Date of this assessment	
Date I will score again	

Want a quick check online? The free Scale Readiness Assessment at scalereadinesslab.com takes about five minutes. Twenty-five questions give you a Scale Readiness Score out of 100, a score for each rung, the biggest risk in your business and your next priority.

The Founder's Inner Game

Chapter 11: The Psychology No One Talks About

The most persistent bottleneck in most scaling businesses is the founder's own psychology. Understanding this is not therapy. It is strategy. Answer these privately and honestly.

"If the business runs without me, who am I?"

Where do I feel valuable because others depend on me?

Where has stepping back in felt necessary, when it was really destructive?

What value do I bring as the architect, strategist and culture carrier, rather than as the person who executes?

Your support architecture

The most important infrastructure investment some founders need to make is not in their business. It is in the support around themselves.

Support	Who	In place?
Peer group		
Mentor		
Coach		

Who could I talk to honestly about the gap between the confidence my team needs to see and the doubt I actually feel?

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TOOL 18 • PUT THE LADDER TOGETHER

The 90-Day Plan

Chapter 12: Your First Ninety Days on the Ladder (and Appendix D, Exercise 4)

A week-by-week roadmap with gate check tracking. Tick each step as you finish it.

Days 1 to 7: The Accounting Sprint

- ☐ Day 1. Assemble every financial record you have. Know what exists. Write down what is missing.
- ☐ Day 2. Set up accounting software and connect it to your bank account, or make sure it is current.
- ☐ Days 3 and 4. Calculate revenue for each of the past three months, total costs, gross margin, net profit or loss, current cash position, average monthly burn rate and runway in months. Note each unknown and the action to close it.
- ☐ Day 5. Write your honest three-sentence assessment of what the numbers are telling you.
- ☐ Days 6 and 7. Identify the three most important financial actions for the next thirty days. Assign ownership. Set deadlines.
- ☐ Can you answer all six Accounting gate check questions from memory? If yes, proceed. If not, extend the sprint.

Days 8 to 30: The Systems Sprint

- ☐ Week two. Document your core delivery process end to end: every step, every tool, every quality standard.
- ☐ Week three. Document your client onboarding process the same way.
- ☐ Week four. Set up your knowledge base. Upload the two processes. Share with the team as the source of truth. Assign an owner to each process.

Days 31 to 60: People and Systems Deepening

- ☐ Keep building the process library.
- ☐ At least one team member trained on and independently running each documented process.
- ☐ Conduct a people audit. Address misalignment now.

-
- ☐ Begin hiring for the most critical gap, starting with the full role definition, before writing any job advert.
-

Days 61 to 90: The Marketing Foundation

- ☐ Write your positioning statement. Test it with people who know your business honestly. Revise until it is specific and different.
 - ☐ Write and publish your first three pieces of cornerstone content.
 - ☐ Identify five podcasts, publications or speaking opportunities that reach your audience. Write a specific pitch for each. Submit all five by day ninety.
-

Your plan, month by month

Month	Rung focus	Specific actions	Gate check target
1			
2			
3			

Founder Freedom Check scheduled for (date)	
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TOOL 19 • PUT THE LADDER TOGETHER

The Founder Freedom Check

Chapter 12: Your First Ninety Days on the Ladder (and Appendix B)

The gate check that sits above all five rungs. Not the same when you return. Healthier.

Are all five gates passed?

Gate	Question	Result
1. Accounting	Can you read your P&L and know your burn rate today?	☐ Pass ☐ Not ready
2. Systems	Could someone else run your core operations from documentation alone?	☐ Pass ☐ Not ready
3. People	Are your people running systems, or are you still running everything yourself?	☐ Pass ☐ Not ready
4. Marketing	Is qualified demand arriving consistently without your direct involvement?	☐ Pass ☐ Not ready
5. Sales	Do you have a repeatable sales process that closes without founder dependency?	☐ Pass ☐ Not ready

Gate Check

Could you step away from the operational day-to-day for ninety days, fully, without checking email or taking calls, and return to find the business healthier than when you left?

PASS

All five gate checks in place. The business improves in the founder's absence.

NOT READY

Any gate is still not ready, or the business would only stand still while you are away.

Our result: ☐ Pass ☐ Not ready

Date I plan to step away	
What was healthier when I came back?	

The Three Questions That Matter

Chapter 13: The Business That Sets You Free

These are not signs of weakness. They are signs of a founder who is paying attention to the business, to themselves and to the relationship between the two.

“Is this what I should have built?”

“Is what I’m doing still meaningful to me?”

“Is there enough of me left for the life outside of this?”

Second Curve Review

Chapter 14: The Second Curve

While the current model is still strong, begin building what comes after it. The time to build the replacement is while you still have the resources and the options to do it thoughtfully.

Which of our systems, structures or habits that helped us scale could now resist what comes next?

Customer intelligence: how do we listen for unmet needs and changing requirements?	
Internal intelligence: how does insight reach us from the team closest to the work?	
Dedicated resource: who and what is set aside to explore nearby opportunities?	

Opportunity to explore	What we have heard	Next step

AI and the Ladder

Chapter 15: AI and the Future of the Ladder

The sequence does not change. AI changes the speed and cost of building each rung. The question is not whether to use AI. It is which processes to support with it, and where human judgement must stay in charge.

Rung	Where AI could help us	Where human judgement stays in charge
Accounting		
Systems		
Marketing		
Sales		

AI can amplify and spread insight. It cannot create it from nothing. The signal must come from you.

What insight, framework or perspective is ours alone to put into our content?

The Ladder by Business Type

Chapter 16: The Ladder by Business Type

The sequence is universal. The implementation varies. Work through the section for your type of business.

Service businesses

- ☐ We track utilisation: the share of available billable time that is actually billed.
- ☐ We have systematised the repeatable 80% of delivery so the bespoke 20% gets focused attention.
- ☐ Our expertise is visible publicly.

Product businesses

- ☐ We know the unit economics of each product before scaling volume.
- ☐ For physical products, we manage the cash gap between buying inventory and getting paid.

SaaS businesses

- ☐ Customer success is built before we invest heavily in sales.
- ☐ We track churn, retention and expansion, not just acquisition.

Platform businesses

- ☐ We use network effects: the platform gets more valuable as users grow.
- ☐ Our marketing builds the density and activity that make the platform valuable, not just sign-ups.

What does this mean for the rung we are building now?

Eleven Truths Check

Chapter 17: Eleven Truths Nobody Tells Founders About Scaling

Read each truth. Tick the ones that apply to you right now.

- ☐ 1. The business will be hard to build even when you're doing everything right.
- ☐ 2. The moment growth starts to feel easier is often the moment the next problem is forming.
- ☐ 3. Most of your competitors are also running without the ladder.
- ☐ 4. The people decisions you avoid are the most expensive ones you make.
- ☐ 5. The market does not care how hard you worked.
- ☐ 6. Founder depression is far more common than anyone says. Seek help. It is the strategically correct decision.
- ☐ 7. The version of your business you imagined at the start will not be the version you build.
- ☐ 8. Speed is not always an advantage.
- ☐ 9. What you measure changes what you build.
- ☐ 10. The business cannot give you the things that only life can give you.
- ☐ 11. The business you build will outlive the person you are today.

Which truth do I most need to act on, and what will I do?

The Ladder on One Page

Appendix A: Quick Reference, The Scale Readiness Ladder

The business scaled the revenue before it scaled the infrastructure.

The five rungs, in order

1. Accounting: the foundation	Know your numbers before you move anything else. Gate: Can you read your P&L and know your burn rate today?
2. Systems: the machine	Make processes repeatable before you hire or sell more. Gate: Could someone else run your core operations from documentation alone?
3. People: the multiplier	Hire into systems. Gate: Are your people running systems, or are you still running everything yourself?
4. Marketing: the engine	Build demand that arrives without your direct involvement. Gate: Is qualified demand arriving consistently without your direct involvement?
5. Sales: the converter	Convert demand through a process that doesn't need you to close every deal. Gate: Do you have a repeatable sales process that closes without founder dependency?

Know your numbers → Build the machine → Staff the machine → Fill the pipeline → Close the deals

The warning

Most founders start with Sales, skip Systems, and wonder why growth breaks them. The ladder only holds if every rung is in place before you climb to the next.

The named concepts

Scale Fragility	The state in which revenue growth masks deteriorating infrastructure.
Infrastructure Debt	The accumulated cost of systems and processes never built, always deferred.
Revenue Mirage	The point at which revenue growth creates the convincing illusion of financial health.
Founder Gravity	The force that draws every important decision back toward the founder regardless of who nominally owns it.
Operational Drift	The gradual divergence between the speed at which revenue grows and the speed at which infrastructure matures.

Build in this order. Every rung before the next.

TOOL 26 • QUICK REFERENCE

The Five Gate Checks Tracker

Appendix B: The Five Gate Checks, Complete Reference

Each gate is pass or not ready. Record the date you test each one and the result. Do not climb to the next rung until the one below it is passed.

1. Accounting: Can you read your P&L and know your burn rate today?

Pass	Answer all six financial questions from memory in under two minutes: last month's revenue, last month's gross margin, current cash position, monthly burn rate, months of runway, margin trend over three months.	
Date tested		☐ Pass ☐ Not ready

2. Systems: Could someone else run your core operations from documentation alone?

Pass	A capable new person executes each core process to the required standard using only the documentation, without guidance from the founder or experienced team members.	
Date tested		☐ Pass ☐ Not ready

3. People: Are your people running systems, or are you still running everything yourself?

Pass	Core operations continue for a full working week without any founder operational involvement. The team functions with genuine, unhesitating authority.	
Date tested		☐ Pass ☐ Not ready

4. Marketing: Is qualified demand arriving consistently without your direct involvement?

Pass	Qualified inbound enquiries arriving reliably from sources other than the founder's personal network, at volume sufficient to sustain sales targets.	
Date tested		☐ Pass ☐ Not ready

5. Sales: Do you have a repeatable sales process that closes without founder dependency?

Pass	Documented revenue from team members without founder sales involvement. Active CRM. Sales playbook used in actual onboarding, producing measurable results.	
Date tested		☐ Pass ☐ Not ready

The Founder Freedom Check: Could you step away from operational day-to-day for ninety days and return to find the business healthier than when you left?

Pass	All five gate checks in place. The business improves in the founder's absence.	
Date tested		☐ Pass ☐ Not ready