

\$100M SCALING ROADMAP

► STAGE 0: IMPROVISE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 0: IMPROVISE



0: IMPROVISE		
HEADCOUNT	NA	
YOUR ROLE	RESEARCHER	
LEADERSHIP STRUCTURE	Just you.	
# OF COMPANIES HERE	NA...you're not a company yet.	
	CONSTRAINT	TO GRADUATE
PRODUCT	You have nothing to sell.	Make something FREE to give away
MARKETING	No one knows about your stuff.	Tell people you have FREE stuff.
SALES	You don't know how to sell	Get people to try it for free
CUSTOMER SERVICE	No customers to service.	Service your free customers.
INFORMATION TECH (IT)	You have no tech.	Get a Computer. Internet. Microphone. Phone. Email.
RECRUITING	You don't know how to work.	You recruit yourself to work.
HUMAN RESOURCES (HR)	You're unprotected.	Create an entity to separate your personal assets from your business assets.
FINANCE	Your personal money is the business's money.	Get a business bank account. Put money in. Write off start up expenses to save on taxes.
Bottom line	Nothing is happening.	Get people to try your stuff for free.

1: MONETIZE		
At this level only 9% of people own a business.		
	CONSTRAINT	TO GRADUATE
PRODUCT	Not enough to sell	Fix it until it's good enough to sell. Make V1 product.
MARKETING	You have F&B stuff for sale.	Tell people you have paid stuff. Sign up for free ad spend credits.
SALES	Don't know how to sell	Use good results from free people to sell paid people. Offer to solve their problems for money.
CUSTOMER SERVICE	They don't like it or use it.	Figure out all hidden costs (why they don't like it/use it) by talking to them.
INFORMATION TECH (IT)	Software/tools or social media.	Figure out the (free) software you need by joining free groups and reading online forums.
RECRUITING	Someone or have the time to do it.	Reach out to people you know to help you OR use freelancer platforms to get help.
HUMAN RESOURCES (HR)	They to get work done and don't get paid you want.	Create basic vendor agreements & expectations
FINANCE	Ways to collect money. No makes no money.	Set up a payment processor. Run a payment. Get a deposit. Make your first sale.

0. IMPROVISE

5. PRODUCTIZE

1. MONETIZE

6. OPTIMIZE

2. ADVERTISE

7. CATEGORIZE

3. STABILIZE

8. SPECIALIZE

4. PRIORITIZE

9. CAPITALIZE

STAGE 0: IMPROVISE

HEADCOUNT	NA	
YOUR ROLE	RESEARCHER	
LEADERSHIP STRUCTURE	Just you.	
# OF COMPANIES HERE	NA...you're not a company yet.	
	CONSTRAINT	TO GRADUATE
PRODUCT	You have nothing to sell.	Make something FREE to give away
MARKETING	No one knows about your stuff.	Tell people you have FREE stuff.
SALES	You don't know how to sell	Get people to try it for free
CUSTOMER SERVICE	No customers to service.	Service your free customers.
INFORMATION TECH (IT)	You have no tech.	Get a Computer. Internet. Microphone. Phone. Email.
RECRUITING	You don't know how to work.	You recruit yourself to work.
HUMAN RESOURCES (HR)	You're unprotected.	Create an entity to separate your personal assets from your business assets.
FINANCE	Your personal money is the business's money.	Get a business bank account. Put money in. Write off start up expenses to save on taxes.
Bottom line	Nothing is happening.	Get people to try your stuff for free.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



Repeat themes to be aware of

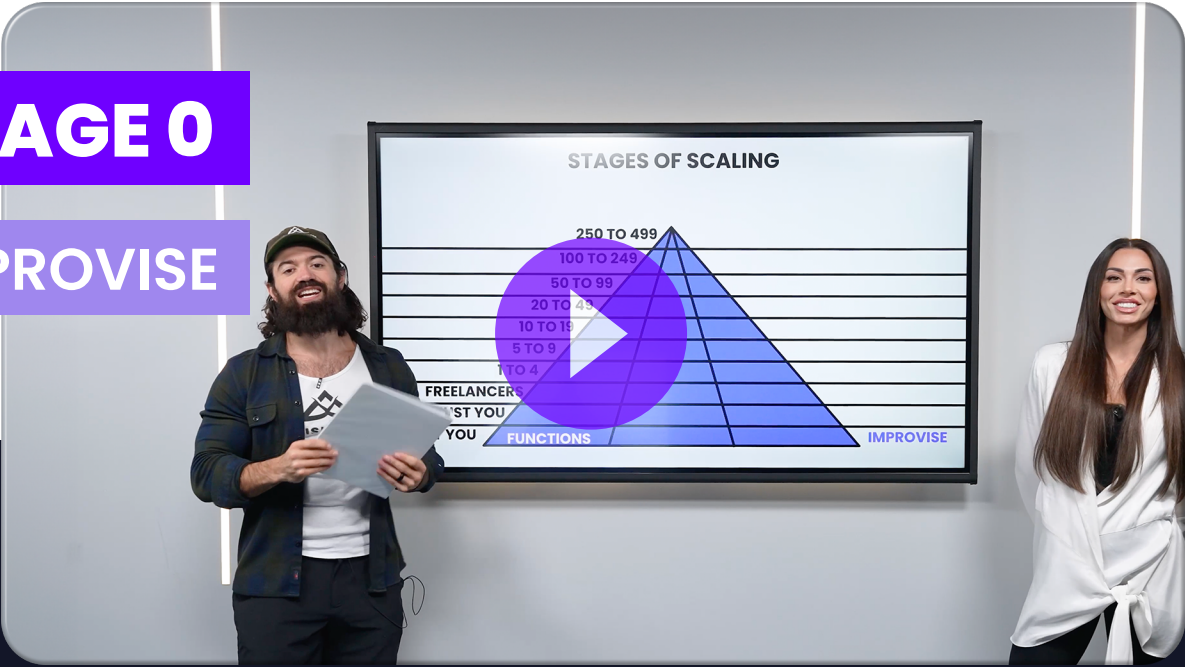


How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE

STAGE 0
IMPROVISE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 0**



YOUR ROLE

Researcher



HEADCOUNT

N/A



BOTTOM LINE

Nothing is
happening



GRADUATE BY

Get people to try
your stuff for free

WHEN YOU HIT “STAGE 0: IMPROVISE”

Stage 0 is like being at the very beginning of building a house – you don’t even have the tools or materials yet, but you’re ready to start. At this stage, you’re just one person with an idea, but no actual business. The goal is simple: get people to try your stuff for free.

Think of it like being a brand new cook who wants to open a restaurant someday. Before charging anyone money, you need to practice cooking and have people taste your food to see if it’s any good. That’s what Stage 0 is all about – testing things out without asking for money.

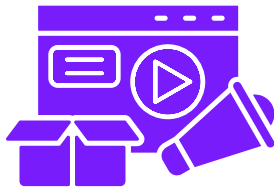
HERE’S WHAT YOU NEED TO FOCUS ON AT STAGE 0:





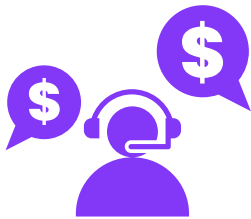
Product

You need to make something you can give away for free. It could be a service (like helping someone with their computer), information (like teaching someone how to do something), or an actual product. The important thing is that it's free so people will try it.



Marketing

You need to tell people about your free stuff. The easiest way is to start with people you know – friends, family, people you've emailed before, or people who follow you on social media. You just need to let them know you have something free that might help them.



Sales

Since you don't know how to sell yet, you're just asking people to try your free stuff. When they try it, you ask them what they think and what would make it better. This helps you learn what people actually want.



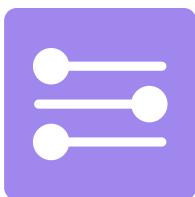
Customer Service

You need to take really good care of the people who try your free stuff. Answer their questions quickly, help them use what you gave them, and be super nice – even though they aren't paying. These people are helping you learn what works and what doesn't.



Technology

You just need the basics—a computer, internet connection, phone, and email address. Nothing fancy. Think of these as your basic tools, like a hammer and screwdriver when building a house.



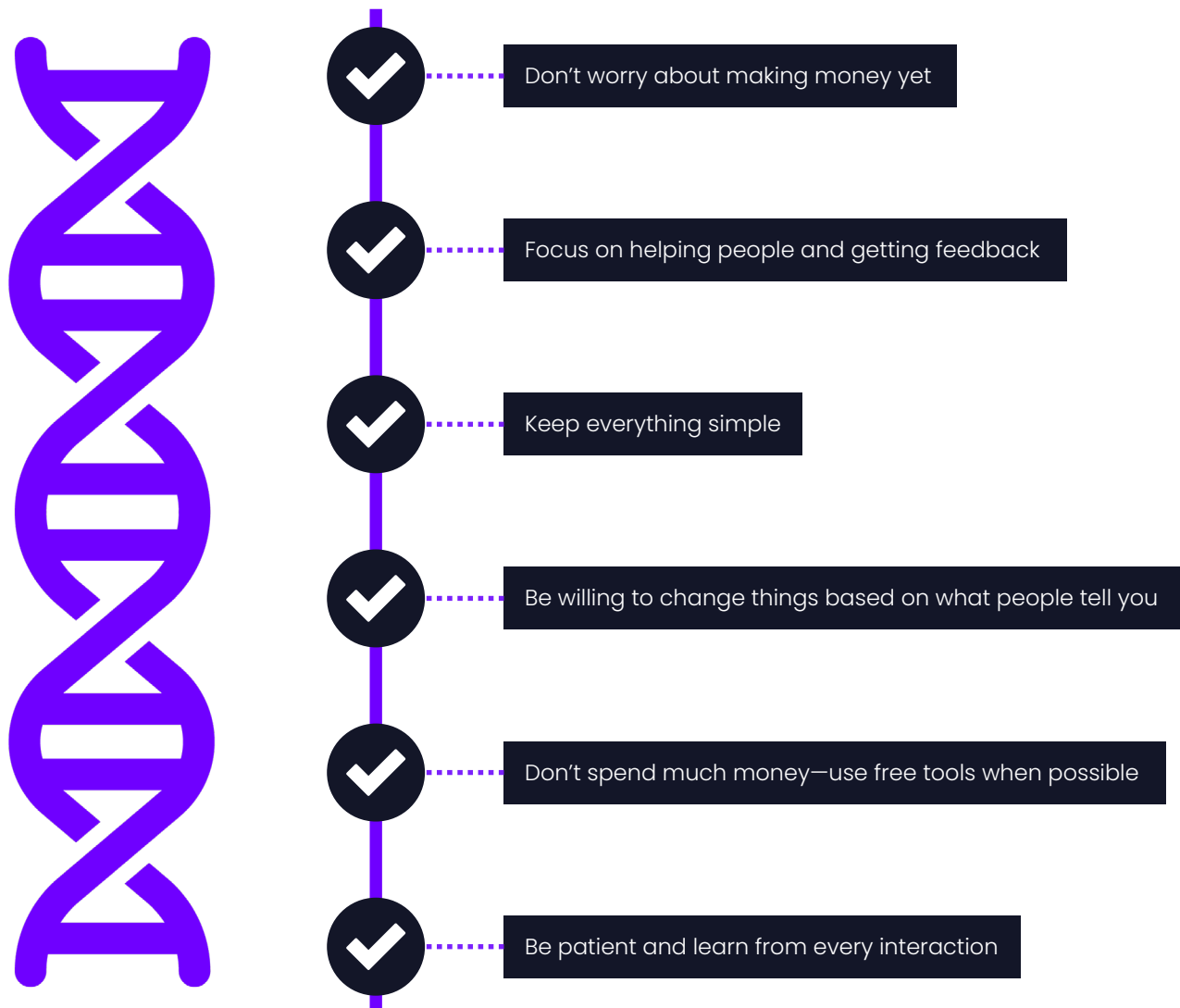
Basic Setup

You need to protect yourself by creating a business entity (like an LLC) to keep your personal money separate from business money. You'll also need a business bank account and to keep track of any money you spend on your business since you can write these off on taxes.

WHAT SUCCESS LOOKS LIKE AT STAGE 0

The most important thing at Stage 0 is to find out if people actually want what you're offering. It's like cooking for friends before opening a restaurant – you want honest feedback about whether your food is good and what would make it better.

SOME KEY THINGS TO REMEMBER:



THE MAIN GOAL IS TO GET ENOUGH PEOPLE TO TRY YOUR FREE STUFF AND LIKE IT.

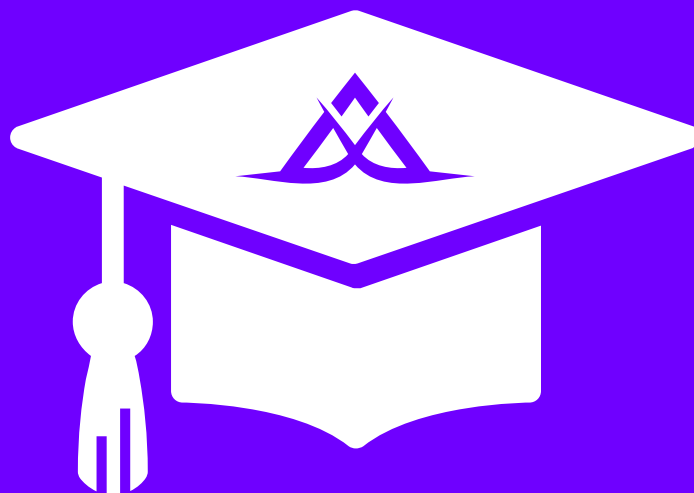
Once people are saying good things about what you offer and coming back for more, you know you're ready to move to Stage 1, where you'll start charging money.

THINK OF STAGE 0 AS PRACTICE MODE OR THE TUTORIAL LEVEL IN A VIDEO GAME.

You're learning the basic moves and getting comfortable before the real game begins. It might feel slow or frustrating at times, but this foundation is super important for building a successful business later.

THE SIGN THAT YOU'RE READY TO GRADUATE FROM STAGE 0 IS SIMPLE:

People are actually using your free stuff and finding it helpful. When that happens, you can start thinking about charging money and moving to Stage 1.



THE FASTEST WAY TO START AN ONLINE BUSINESS

Rank	User	Group	Last 24h	New MRR
1	Jamie Sea	She Creates Wealth	+\$1,586	\$37,082
2	School of Har...	School of Mentors	+\$1,740	\$31,500
3	Bill Von Fumetti	Keyboard Rich	+\$7,857	\$30,943
4	Stephen G. Po...	No-Code Architects	+\$1,440	\$28,840
5	Timothy Scha...	Producer Academy	+\$997	\$26,919
6	Matteo Parozzi	The Mastermind School	+\$1,994	\$24,519
7	Samuel Millisap	limitless coaching	+\$3,600	\$21,850
8	Elmer Locker Jr	Simulation world	+\$611	\$19,834
9	Nate Trillo	Trading Academy	+\$247	\$18,725
10	Joshua Steil	The Credit Club	+\$5,654	\$17,895

Would you like the fastest way to start an online business? Meet Skool. Skool is an online platform for building a group about whatever you want. Right now 1 out of 2 people who start a paid community on Skool make money. You can get started for free today.

Start For Free

skool.com/GAMES

THIS IS WHAT'S COMING NEXT...

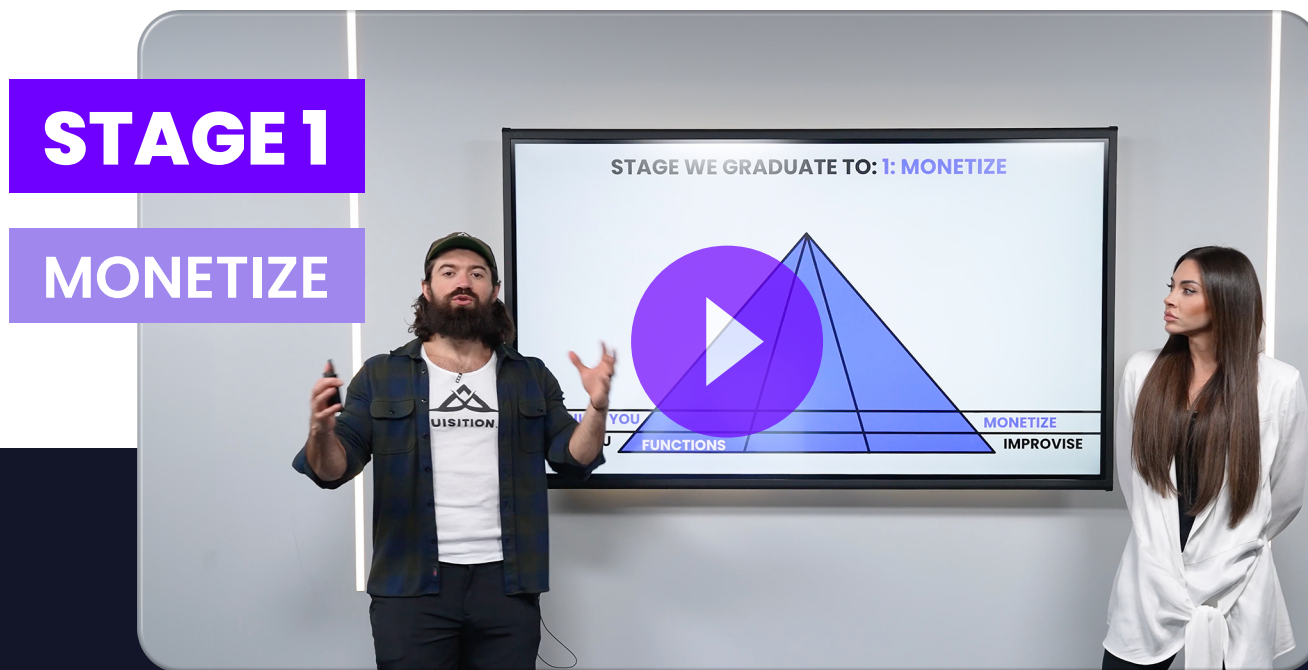


STAGE 1: MONETIZE

STAGE 1: MONETIZE

HEADCOUNT	1	
YOUR ROLE	STARTER	
LEADERSHIP STRUCTURE	Still Just you.	
# OF COMPANIES HERE	30,000,000 (100% achieve this level) <i>only 9% of people own a business.</i>	
	CONSTRAINT	TO GRADUATE
PRODUCT	Not good enough to sell	Fix it until it's good enough to sell. Make V1 product.
MARKETING	No one knows you have PAID stuff for sale.	Tell people you have paid stuff. Sign up for free ad spend credits.
SALES	You <i>still</i> don't know how to sell	Use good results from free people to sell paid people. Offer to solve their problems for money.
CUSTOMER SERVICE	Free customers don't like it or use it.	Figure out all hidden costs (why they don't like it/use it) by talking to them.
INFORMATION TECH (IT)	You have no basic software/tools or social media.	Figure out the (free) software you need by joining free groups and reading online forums.
RECRUITING	You don't know how to do something or have the time to do it.	Reach out to people you know to help you OR use freelancer platforms to get help.
HUMAN RESOURCES (HR)	You pay money to freelancers to get work done and don't get what you want.	Create basic vendor agreements & expectations
FINANCE	You have no way to collect money.	Set up a payment processor. Run a payment. Get a deposit.
Bottom line	Your business makes no money.	Make your first sale.

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 1**



YOUR ROLE

Starter



HEADCOUNT

1



BOTTOM LINE

Your business
makes no money



GRADUATE BY

Make your
first sale

WHEN YOU HIT “STAGE 1: MONETIZE”

Welcome to Stage 1: The “Monetize” stage! You’ve graduated from giving stuff away for free, and now it’s time to start making actual money. Think of this like moving from cooking free meals for friends to opening a small food stand where people actually pay for your food.

THE BIG PICTURE:

At this stage, you’re still just one person, but now you’re what we call a “starter” – someone who’s starting to turn their idea into a real business. About 30 million people reach this stage, but only 9% of people in the United States actually own a business. It’s like being in the kitchen by yourself, learning to cook and serve customers at the same time.

Your Main Challenge: Product

Marketing Challenges

Sales Challenges

Customer Service

Technology Needs

Getting Help

Managing Money

Protecting Yourself

The Human Side

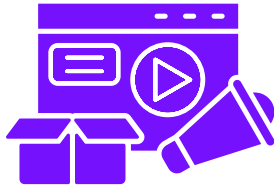




Your Main Challenge: Product

Your biggest problem right now is that your product or service isn't quite good enough for people to pay for yet. Maybe your food tastes good, but the portions are messy, or maybe your computer repair service works but takes too long. You need to fix these issues until people think, "Yes, this is worth paying for!"

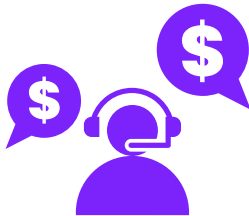
The key is to make what we call a "Version 1" or "V1" product. This doesn't mean it has to be perfect – it just needs to be good enough that people will pay for it. Think of it like making a sandwich that's good enough to sell at a food truck, even if it's not fancy restaurant quality yet.



Marketing Challenges

Now comes a tricky part – telling people you're charging money for something that used to be free. It's like telling your friends who used to get free sandwiches that now they need to pay. You need to:

- Let people know you're selling something
- Explain why it's worth paying for
- Sign up for free advertising credits on platforms like Google or Facebook
- Show how your paid version is better than the free one was



Sales Challenges

You probably don't know much about selling yet, and that's okay! The best approach is to:

- Use results from your free customers as proof ("Look how much this helped them!")
- Talk to people about their problems and show how you can solve them
- Start with people who already liked your free stuff
- Be honest about what you're offering and what it costs

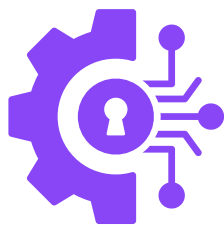


Customer Service

Your free customers helped you learn, but paying customers are different. They:

- Have higher expectations
- Are more likely to complain
- Need more attention
- Want better results

Your job is to figure out why people might not like or use your product. Maybe your computer repair service takes too long, or maybe your sandwich packaging leaks. You need to find these “hidden costs” – things that make customers unhappy even if they don’t tell you directly.



Technology Needs

You probably can’t afford fancy software yet, but you can:

- Join free online groups to learn what tools others use
- Read forums about your industry
- Use free trials of basic software
- Start with free tools like Google’s business tools



Getting Help

You’re going to realize you can’t do everything yourself. When this happens:

- Reach out to people you know who might help
- Use websites like Upwork or Fiverr to find freelancers
- Start small with part-time help
- Be clear about what you need done



Managing Money

This is crucial—you need to:

- Set up a way to collect payments (like Square or PayPal)
- Actually run a real payment through your system
- Get your first paying customer’s money into your bank account
- Keep track of who has paid and who hasn’t



Protecting Yourself

When money starts flowing, you need to:

- Create basic agreements with anyone helping you
- Set clear expectations with freelancers
- Get everything in writing
- Make sure you understand what you’re agreeing to



The Human Side

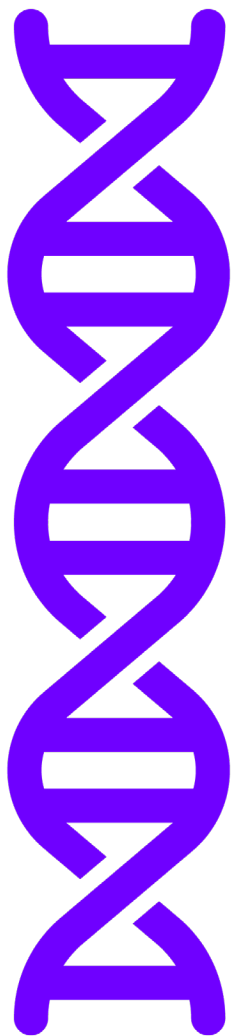
During this stage, you'll feel:

- Nervous about charging money
- Worried about whether people will pay
- Excited when you get your first sale
- Overwhelmed by all the new things to learn
- Proud when someone says yes to paying

WHAT SUCCESS LOOKS LIKE AT STAGE 1



YOUR DAILY FOCUS SHOULD BE:



- ✓ Making your product/service better
- ✓ Telling people about your paid offering
- ✓ Taking care of your first paying customers
- ✓ Learning how to ask for money
- ✓ Setting up basic business systems
- ✓ Managing your money carefully

THE SECRET TO SUCCESS



SIGNS YOU'RE DOING IT RIGHT

People are actually paying you money

Customers are engaged

You're learning from mistakes

Your systems are simple but working

You're keeping track of money

You're starting to understand what customers want



SIGNS YOU NEED MORE WORK

People won't pay your prices

Customers are unhappy

You're losing track of payments

Things feel chaotic

You're still doing everything for free

THE BIG GOAL:

Your main goal in Stage 1 is simple but crucial: make your first sale. Not just one sale, but consistent first sales to different customers. This proves that people will actually pay for what you're offering.

GRADUATING FROM STAGE 1

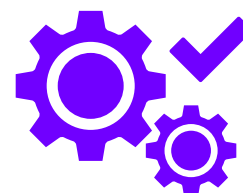
YOU'LL KNOW YOU'RE READY TO MOVE TO STAGE 2 WHEN:



YOU'RE CONSISTENTLY MAKING SALES



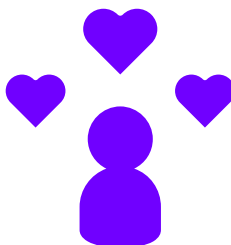
PEOPLE ARE WILLING TO PAY YOUR PRICES



YOU HAVE BASIC SYSTEMS IN PLACE



YOU'RE KEEPING TRACK OF MONEY



YOU UNDERSTAND WHAT CUSTOMERS WANT



YOU'RE READY TO START ADVERTISING

REMEMBER

Stage 1 is all about that crucial shift from free to paid. It's about proving that you can create something people will actually pay for. Don't rush it—this foundation is crucial for everything that comes next in your business journey.

This stage can feel scary and uncomfortable, but it's where real businesses are born. Take it one step at a time, celebrate each sale, and learn from every mistake. You're not just selling something now - you're becoming a real business owner.

THE FASTEST WAY TO START AN ONLINE BUSINESS

Rank	User	Group	Last 24h	New MRR
1	Jamie Sea	She Creates Wealth	+\$1,586	\$37,082
2	School of Har...	School of Mentors	+\$1,740	\$31,500
3	Bill Von Fumetti	Keyboard Rich	+\$7,857	\$30,943
4	Stephen G. Po...	No-Code Architects	+\$1,440	\$28,840
5	Timothy Scha...	Producer Academy	+\$997	\$26,919
6	Matteo Parozzi	The Mastermind School	+\$1,994	\$24,519
7	Samuel Millisap	limitless coaching	+\$3,600	\$21,850
8	Elmer Locker Jr	Simulation world	+\$611	\$19,834
9	Nate Trillo	Trading Academy	+\$247	\$18,725
10	Joshua Steil	The Credit Club	+\$5,654	\$17,895

Would you like the fastest way to start an online business? Meet Skool. Skool is an online platform for building a group about whatever you want. Right now 1 out of 2 people who start a paid community on Skool make money. You can get started for free today.

Start For Free

skool.com/GAMES

\$100M SCALING ROADMAP

► STAGE 2: ADVERTISE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 2: ADVERTISE



1: MONETIZE			2: ADVERTISE			3: STABILIZE		
HEADCOUNT	1		HEADCOUNT	1				
YOUR ROLE	STARTER		YOUR ROLE	DOER				
LEADERSHIP STRUCTURE	Chief Just you.		LEADERSHIP STRUCTURE	Freelancers				
# OF COMPANIES HERE	30,000,000 (100% achieve this level) only 1% of people own a business		# OF COMPANIES HERE	30,000,000 (100% of companies)				
CONSTRAINT			CONSTRAINT			CONSTRAINT		
PRODUCT	Not good enough to sell	Fix it	PRODUCT	Paying customers have higher expectations, product is <u>unreliable</u> & not good enough.	Fix it good enough for now in an unscalable way.	PRODUCT	Everything that's wrong	Fix the thing they complain about most.
MARKETING	No one knows you have PAID stuff for sale.	Tell people	MARKETING	Lead flow is inconsistent (STOP-START)	Live by the Rule of 100. Prioritize advertising daily.	MARKETING	Doing too much (colder)	Add long term nurture (emails &/or content)
SALES	You still don't know how to sell	Figure out	SALES	Sales conversions are inconsistent	Nail down a script for setting and closing - CLOSER & ACA.	SALES	Doing too much (colder)	Decide on basic qualifications. Outsource setting & calendaring.
CUSTOMER SERVICE	Free customers don't like it or use it.	Figure out	CUSTOMER SERVICE	Paid customers have higher standards & complain more.	Learn to deal with disappointed customers (Angry boat).	CUSTOMER SERVICE	Customers feel lost.	Learn to onboard customers properly.
INFORMATION TECH (IT)	You have no basic software/tools or social media.	Research	INFORMATION TECH (IT)		Get testimonials from happy customers. (Spiphany script)	INFORMATION TECH (IT)	Using tools that you don't use.	Figure out the useful ones. Extend free trial thru credits/discounts. Cut the rest. Basic sales pipeline.
RECRUITING	You don't know how to do something or have the time to do it.	Set up	RECRUITING	You have no money to afford tech.	Use free tech (google suite) and get free trials/credits for starter softwares. Website/hosting. Starter CRM/POS.	RECRUITING	Using quality applicants.	Learn how to write a job description & review resumes.
HUMAN RESOURCES (HR)	You pay money to freelancers to get work done and don't get what you want.	Set up	HUMAN RESOURCES (HR)	Too much work for part timers.	Convert part timers to FTEs, make public posts, or run ads on job boards to get full timers.	HUMAN RESOURCES (HR)	Doing employee taxes and fees.	Get a payroll provider so all taxes and fees by state are handled.
FINANCE	You have no way to collect money	Set up	FINANCE	You have FTEs but structured like contractors.	Setup W-2 and 1099s.	FINANCE	Doing paid informally.	Setup: Payroll processing, basic bookkeeping, managing invoices and payments.
Bottom line	Your business makes no money.		Bottom line	New customers are inconsistent.	Let more people know about your stuff.	Bottom line	Doing for one person to do	Get help.

0. IMPROVISE

5. PRODUCTIZE

1. MONETIZE

6. OPTIMIZE

2. ADVERTISE

7. CATEGORIZE

3. STABILIZE

8. SPECIALIZE

4. PRIORITIZE

9. CAPITALIZE

STAGE 2: ADVERTISE

HEADCOUNT	1	
YOUR ROLE	DOER	
LEADERSHIP STRUCTURE	Freelancers	
# OF COMPANIES HERE	30,000,000 (100% of companies)	
	CONSTRAINT	TO GRADUATE
PRODUCT	Paying customers have higher expectations, product is <u>unreliable</u> & not good enough.	Fix it good enough for now in an unscalable way.
MARKETING	Lead flow is inconsistent (STOP:START)	Live by the Rule of 100. Prioritize advertising daily.
SALES	Sales conversions are inconsistent	Nail down a script for setting and closing – CLOSER & ACA.
CUSTOMER SERVICE	Paid customers have higher standards & complain more.	Learn to deal with disappointed customers (Angry boat). Get testimonials from happy customers. (Epiphany script)
INFORMATION TECH (IT)	You have no money to afford tech.	Use free tech (google suite) and get free trials/credits for starter softwares. Website/hosting. Starter CRM/POS.
RECRUITING	Too much work for part timers.	Convert part timers to FTers, make public posts, or run ads on job boards to get full timers.
HUMAN RESOURCES (HR)	You have FTEs but structured like contractors.	Setup W-2 and 1099s.
FINANCE	You don't keep track of money or have a way to pay taxes.	Spin up quickbooks equivalent. Save for taxes. Check your bank account daily.
Bottom line	New customers are inconsistent.	Let more people know about your stuff.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



Repeat themes to be aware of



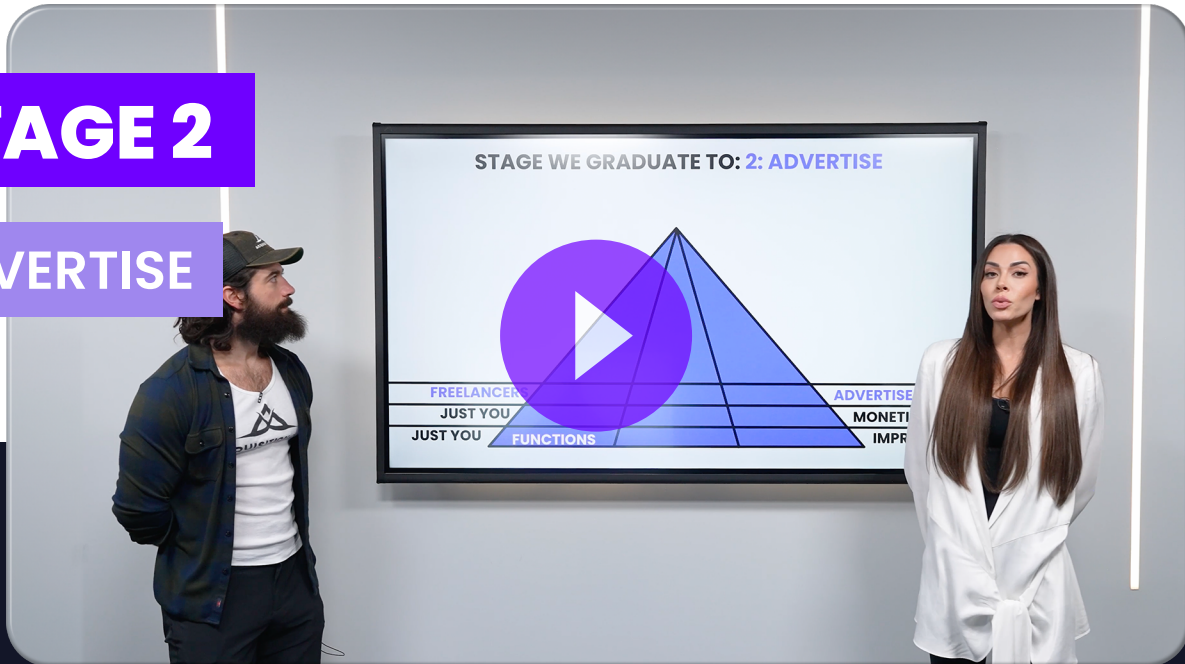
How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE

STAGE 2

ADVERTISE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 2**



YOUR ROLE

DOER



HEADCOUNT

1



BOTTOM LINE

New customers
are inconsistent



GRADUATE BY

Let more people know
about your stuff

WHEN YOU HIT “STAGE 2: ADVERTISE”

Welcome to Stage 2: The “Advertise” stage! You’ve made your first sales, and now it’s time to tell more people about your business. Think of this like moving from having a food stand that only your friends know about to actually advertising to get new customers who’ve never heard of you.

THE BIG PICTURE:

In this stage, you’re what we call a “doer” – someone who’s actively running their business and starting to use freelancers for help. You’re still the main person, but now you’re beginning to get part-time help. They give you some time back and help you with tasks you don’t have the skills (or desire) to do. All businesses that survive reach this stage, so you’re in good company.

Your Main Challenge: Product

Marketing Challenges

Sales Challenges

Customer Service

Technology Needs

Getting Help

Managing People

Money Management

Daily Life at Stage 2

Common Feelings at This Stage





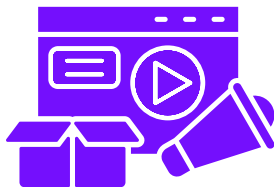
Your Main Challenge: Product

Your paying customers are much pickier than your free ones were! They have higher expectations, and your product might not be reliable enough yet. Maybe your food service is sometimes great but sometimes inconsistent, or your computer repair work takes different amounts of time for similar problems.

The key here is to fix things in an “unscalable way.” This means doing whatever it takes to make customers happy, even if it’s not efficient. You might need to:

- Work longer hours to get things perfect
- Double-check everything
- Provide extra service at no charge
- Fix problems immediately when they come up

Think: driving to the convenience store to drop off ice cream to a customer’s house at 2AM. The point is to be valuable, not scalable yet.

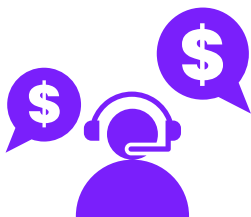


Marketing Challenges

Your biggest problem now is that your customer flow is inconsistent – sometimes you’re too busy, sometimes too quiet. It’s like having a restaurant that’s packed on weekends but empty on weekdays.

You need to:

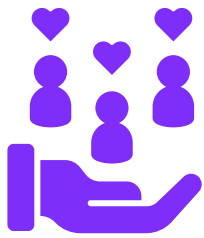
- Follow the “Rule of 100” (spend 100 minutes daily on marketing)
- Make marketing a daily priority, not just when you’re slow. (Get ahead)
- Keep track of what brings in customers (actions & results).
- Test different ways of reaching people. Stick with the one that works best for you. Don’t try and diversify in the beginning. Double down on what works.



Sales Challenges

Sales are up and down, and you need to fix that. It’s time to:

- Create a consistent sales script
- Learn the “CLOSER” method for converting leads
- Practice your pitch until it’s natural
- Track what works and what doesn’t



Customer Service

Paying customers complain more and have higher standards. You need to:

- Learn to handle upset customers (using the “Angry Boat” method)
- Get testimonials from happy customers using the “Epiphany Script”
- Turn complaints into improvements
- Make every customer feel special



Technology Needs

Money is tight, but you need basic tools. Focus on:

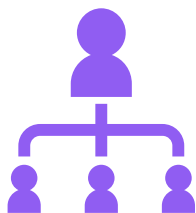
- Using free trials and credits
- Getting basic website/hosting
- Setting up a simple CRM (customer management system)
- Using free Google tools



Getting Help

Your part-timers aren't enough anymore. You need to:

- Start converting part-timers to full-time employees
- Post job ads
- Look for people who want steady work
- Be clear about expectations



Managing People

Now that you have help, you need to:

- Set up proper employment paperwork (W2s and 1099s)
- Create basic training
- Establish work schedules
- Make responsibilities clear



Money Management

Things are getting more complex with money. You need to:

- Set up QuickBooks or similar accounting software
- Save money for taxes
- Check your bank account daily
- Keep track of all expenses
- Start planning for bigger expenses



Your Daily Life at Stage 2

Your typical day might include:

- Serving existing customers
- Marketing for new customers
- Managing part-time help
- Handling money
- Fixing problems
- Improving your product/service
- Talking to potential customers



Common Feelings at This Stage

- Overwhelmed by all the moving parts
- Excited about growth
- Worried about consistency
- Proud of becoming a “real” business
- Stressed about managing others
- Concerned about money flow

SIGNS YOU'RE DOING IT WELL

Customers are coming back

New customers are finding you

Your help is reliable

Money is steady (even if not huge)

Systems are starting to work

Problems get fixed quickly

WARNING SIGNS TO WATCH FOR

Inconsistent quality

Customer complaints increasing

Money problems

Helper turnover

Feeling constantly behind

Too many emergencies

THE KEYS TO SUCCESS:



GRADUATING FROM STAGE 2

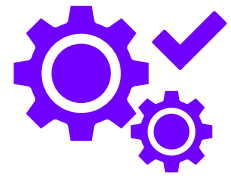
YOU'RE READY FOR STAGE 3 WHEN:



QUALITY IS
CONSISTENT



NEW CUSTOMERS
COME REGULARLY



SYSTEMS ARE
WORKING



MONEY IS
ORGANIZED



HELP IS
RELIABLE



MARKETING
IS STEADY

REMEMBER

This stage is about creating stability and systems. You're moving from "figuring it out" to "doing it right." It might feel slower than you want, but building these foundations is crucial.

THE BIG PICTURE GOAL:

Your main goal in Stage 2 is to get more people to know about your business in a consistent way. You're not just serving customers anymore - you're building a real business that can grow.

FINAL THOUGHTS

Stage 2 is where many businesses start to feel “real.” You’re not just selling something – you’re running a proper business. Take your time, build good habits, and focus on consistency. Every successful business went through this stage, so you’re on the right path!

This stage can feel like a juggling act, but it’s where you learn to be a true business owner. Stay focused on quality, keep marketing daily, and build systems that will support your growth. The more solid your foundation here, the easier your next stages will be.

THE FASTEST WAY TO START AN ONLINE BUSINESS

Rank	User	Group	Last 24h	New MRR
1	Jamie Sea	She Creates Wealth	+\$1,586	\$37,082
2	School of Har...	School of Mentors	+\$1,740	\$31,500
3	Bill Von Fumetti	Keyboard Rich	+\$7,857	\$30,943
4	Stephen G. Po...	No-Code Architects	+\$1,440	\$28,840
5	Timothy Scha...	Producer Academy	+\$997	\$26,919
6	Matteo Parozzi	The Mastermind School	+\$1,994	\$24,519
7	Samuel Millsap	limitless coaching	+\$3,600	\$21,850
8	Elmer Locker Jr	Simulation world	+\$611	\$19,834
9	Nate Trillo	Trading Academy	+\$247	\$18,725
10	Joshua Steil	The Credit Club	+\$5,654	\$17,895

Would you like the fastest way to start an online business? Meet Skool. Skool is an online platform for building a group about whatever you want. Right now 1 out of 2 people who start a paid community on Skool make money. You can get started for free today.

Start For Free

skool.com/GAMES

THIS IS THE STAGE YOU JUST GRADUATED FROM...

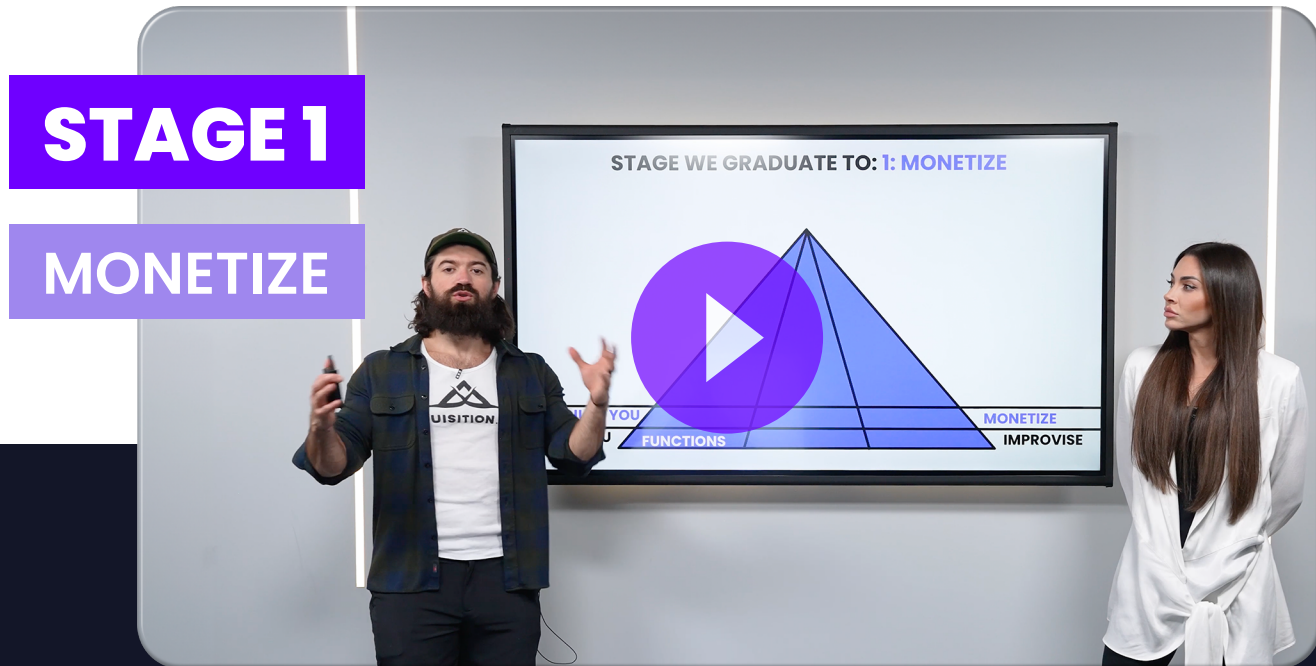


STAGE 1: MONETIZE

STAGE 1: MONETIZE

HEADCOUNT	1	
YOUR ROLE	STARTER	
LEADERSHIP STRUCTURE	Still Just you.	
# OF COMPANIES HERE	30,000,000 (100% achieve this level) <i>only 9% of people own a business.</i>	
	CONSTRAINT	TO GRADUATE
PRODUCT	Not good enough to sell	Fix it until it's good enough to sell. Make V1 product.
MARKETING	No one knows you have PAID stuff for sale.	Tell people you have paid stuff. Sign up for free ad spend credits.
SALES	You <i>still</i> don't know how to sell	Use good results from free people to sell paid people. Offer to solve their problems for money.
CUSTOMER SERVICE	Free customers don't like it or use it.	Figure out all hidden costs (why they don't like it/use it) by talking to them.
INFORMATION TECH (IT)	You have no basic software/tools or social media.	Figure out the (free) software you need by joining free groups and reading online forums.
RECRUITING	You don't know how to do something or have the time to do it.	Reach out to people you know to help you OR use freelancer platforms to get help.
HUMAN RESOURCES (HR)	You pay money to freelancers to get work done and don't get what you want.	Create basic vendor agreements & expectations
FINANCE	You have no way to collect money.	Set up a payment processor. Run a payment. Get a deposit.
Bottom line	Your business makes no money.	Make your first sale.

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 1**



YOUR ROLE

Starter



HEADCOUNT

1



BOTTOM LINE

Your business
makes no money



GRADUATE BY

Make your
first sale

WHEN YOU HIT “STAGE 1: MONETIZE”

Welcome to Stage 1: The “Monetize” stage! You’ve graduated from giving stuff away for free, and now it’s time to start making actual money. Think of this like moving from cooking free meals for friends to opening a small food stand where people actually pay for your food.

THE BIG PICTURE:

At this stage, you’re still just one person, but now you’re what we call a “starter” – someone who’s starting to turn their idea into a real business. About 30 million people reach this stage, but only 9% of people in the United States actually own a business. It’s like being in the kitchen by yourself, learning to cook and serve customers at the same time.

Your Main Challenge: Product

Marketing Challenges

Sales Challenges

Customer Service

Technology Needs

Getting Help

Managing Money

Protecting Yourself

The Human Side

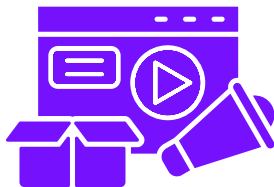




Your Main Challenge: Product

Your biggest problem right now is that your product or service isn't quite good enough for people to pay for yet. Maybe your food tastes good, but the portions are messy, or maybe your computer repair service works but takes too long. You need to fix these issues until people think, "Yes, this is worth paying for!"

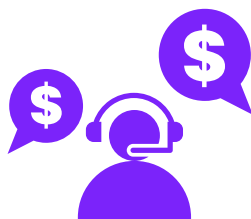
The key is to make what we call a "Version 1" or "V1" product. This doesn't mean it has to be perfect – it just needs to be good enough that people will pay for it. Think of it like making a sandwich that's good enough to sell at a food truck, even if it's not fancy restaurant quality yet.



Marketing Challenges

Now comes a tricky part – telling people you're charging money for something that used to be free. It's like telling your friends who used to get free sandwiches that now they need to pay. You need to:

- Let people know you're selling something
- Explain why it's worth paying for
- Sign up for free advertising credits on platforms like Google or Facebook
- Show how your paid version is better than the free one was



Sales Challenges

You probably don't know much about selling yet, and that's okay! The best approach is to:

- Use results from your free customers as proof ("Look how much this helped them!")
- Talk to people about their problems and show how you can solve them
- Start with people who already liked your free stuff
- Be honest about what you're offering and what it costs



Customer Service

Your free customers helped you learn, but paying customers are different. They:

- Have higher expectations
- Are more likely to complain
- Need more attention
- Want better results

Your job is to figure out why people might not like or use your product. Maybe your computer repair service takes too long, or maybe your sandwich packaging leaks. You need to find these “hidden costs” – things that make customers unhappy even if they don’t tell you directly.



Technology Needs

You probably can’t afford fancy software yet, but you can:

- Join free online groups to learn what tools others use
- Read forums about your industry
- Use free trials of basic software
- Start with free tools like Google’s business tools



Getting Help

You’re going to realize you can’t do everything yourself. When this happens:

- Reach out to people you know who might help
- Use websites like Upwork or Fiverr to find freelancers
- Start small with part-time help
- Be clear about what you need done



Managing Money

This is crucial—you need to:

- Set up a way to collect payments (like Square or PayPal)
- Actually run a real payment through your system
- Get your first paying customer’s money into your bank account
- Keep track of who has paid and who hasn’t



Protecting Yourself

When money starts flowing, you need to:

- Create basic agreements with anyone helping you
- Set clear expectations with freelancers
- Get everything in writing
- Make sure you understand what you’re agreeing to



The Human Side

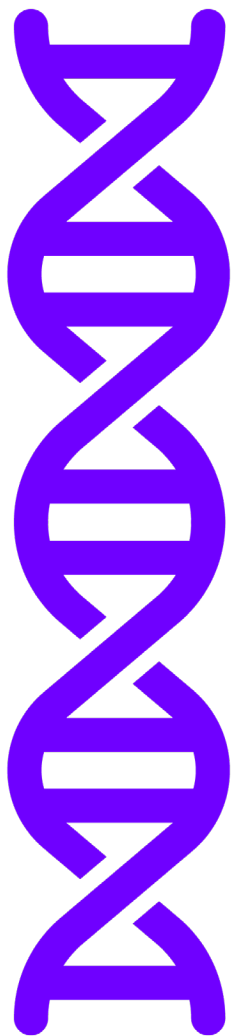
During this stage, you'll feel:

- Nervous about charging money
- Worried about whether people will pay
- Excited when you get your first sale
- Overwhelmed by all the new things to learn
- Proud when someone says yes to paying

WHAT SUCCESS LOOKS LIKE AT STAGE 1



YOUR DAILY FOCUS SHOULD BE:



- ✓ Making your product/service better
- ✓ Telling people about your paid offering
- ✓ Taking care of your first paying customers
- ✓ Learning how to ask for money
- ✓ Setting up basic business systems
- ✓ Managing your money carefully

THE SECRET TO SUCCESS



SIGNS YOU'RE DOING IT RIGHT

People are actually paying you money

Customers are engaged

You're learning from mistakes

Your systems are simple but working

You're keeping track of money

You're starting to understand what customers want



SIGNS YOU NEED MORE WORK

People won't pay your prices

Customers are unhappy

You're losing track of payments

Things feel chaotic

You're still doing everything for free

THE BIG GOAL:

Your main goal in Stage 1 is simple but crucial: make your first sale. Not just one sale, but consistent first sales to different customers. This proves that people will actually pay for what you're offering.

GRADUATING FROM STAGE 1

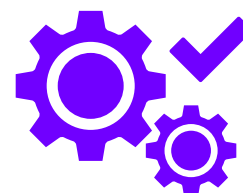
YOU'LL KNOW YOU'RE READY TO MOVE TO STAGE 2 WHEN:



YOU'RE CONSISTENTLY MAKING SALES



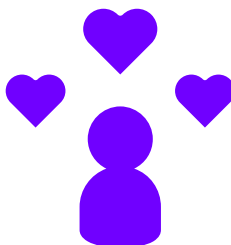
PEOPLE ARE WILLING TO PAY YOUR PRICES



YOU HAVE BASIC SYSTEMS IN PLACE



YOU'RE KEEPING TRACK OF MONEY



YOU UNDERSTAND WHAT CUSTOMERS WANT



YOU'RE READY TO START ADVERTISING

REMEMBER

Stage 1 is all about that crucial shift from free to paid. It's about proving that you can create something people will actually pay for. Don't rush it—this foundation is crucial for everything that comes next in your business journey.

This stage can feel scary and uncomfortable, but it's where real businesses are born. Take it one step at a time, celebrate each sale, and learn from every mistake. You're not just selling something now - you're becoming a real business owner.

THIS IS WHAT'S COMING NEXT...



STAGE 3: STABILIZE

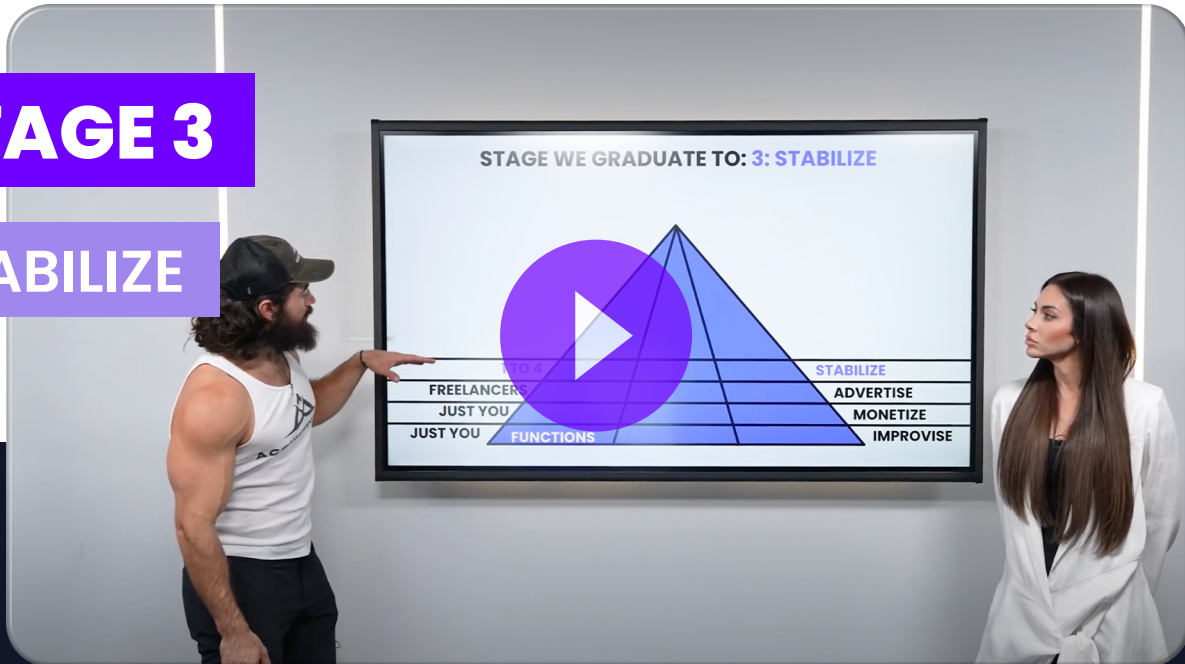
STAGE 3: STABILIZE

HEADCOUNT	1 to 4	
YOUR ROLE	TRAINER	
LEADERSHIP STRUCTURE	First full-time hires	
# OF COMPANIES HERE	7,140,000 (24% of companies)	
	CONSTRAINT	TO GRADUATE
PRODUCT	No time to fix everything that's wrong.	Fix the thing they complain about most.
MARKETING	Leads aren't buying fast enough (colder)	Add long term nurture (emails &/or content)
SALES	Wasting time with bad leads. You don't have enough time to talk to good leads.	Decide on basic qualifications. Outsource setting & calendaring.
CUSTOMER SERVICE	New customers feel lost.	Learn to onboard customers properly.
INFORMATION TECH (IT)	You have a bunch of different tools that you don't use.	Figure out the useful ones. Extend free trial thru credits/discounts. Cut the rest. Basic sales pipeline.
RECRUITING	Not getting quality applicants.	Learn how to write a job description & review resumes.
HUMAN RESOURCES (HR)	You're not withholding employee taxes and fees.	Get a payroll provider so all taxes and fees by state are handled.
FINANCE	People getting paid informally.	Setup: Payroll processing, basic bookkeeping, managing invoices and payments.
Bottom line	There's too much for one person to do.	Get help.

YOUR STAGE

STAGE 3

STABILIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 3**



YOUR ROLE

TRAINER



HEADCOUNT

1 to 4



BOTTOM LINE

There's too much for
one person to do



GRADUATE BY

Get help

WHEN YOU HIT “STAGE 3: STABILIZE”

You’ve made it! You have your first 1-4 full-time employees. About 24% of businesses (around 7 million companies) reach this level. This is when you go from doing everything yourself to having real employees. Your role changes from “doer” to “trainer” because now you have to teach others how to help run the business.

THE BIG CHALLENGE: TOO MUCH WORK, NOT ENOUGH TIME

The main problem at Stage 3 is simple – there’s way too much work for one person to handle. That’s why it’s called the “Stabilize” stage. Everything feels a bit chaotic and you need to make things more stable. Let’s look at what’s happening in each part of the business:

Products and Customers

Sales and Service

Tech and Tools

People and HR

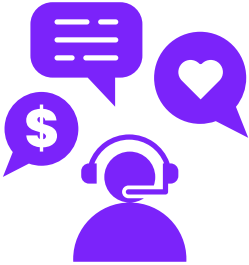
Money Matters





Products & Customers

- Your biggest headache is that you can't fix everything customers complain about
- You have to pick the ONE thing that bothers customers the most and fix just that
- Your leads (potential customers) aren't buying as quickly because they don't know you as well
- You need to start sending emails and creating content to build trust over time



Sales and Service

- You're wasting time talking to people who aren't serious about buying
- You need to make a list of what makes someone a "good" potential customer
- New customers often feel lost when they start using your product/service
- You need to create a proper way to welcome and guide new customers



Tech and Tools

- You probably bought too many different software tools thinking you'd use them all
- Now you need to figure out which ones you actually need and cancel the rest
- You should try to extend free trials or get discounts on the tools you keep
- You need a basic system to track your sales pipeline



People and HR

- It's hard to find good people to hire
- You need to learn how to write good job descriptions and review resumes properly
- You're probably not handling employee taxes correctly
- You need to get a payroll service to handle taxes and fees properly

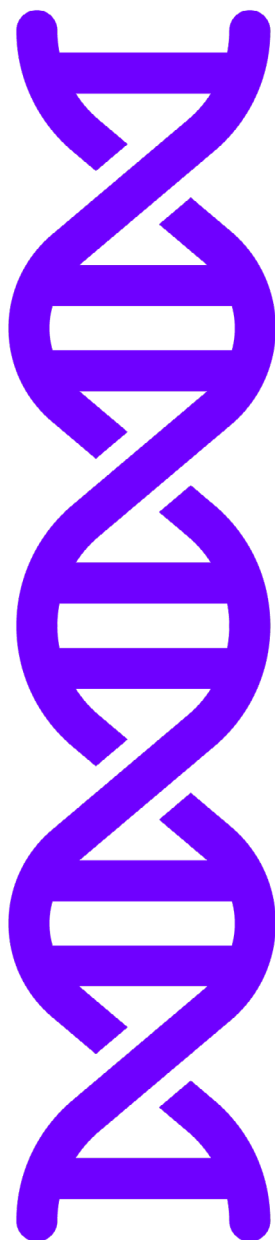


Customer Service

- People are getting paid informally (which isn't good)
- You need to set up proper payroll processing
- You need basic bookkeeping to track money coming in and going out
- You need to manage invoices and payments properly

WHAT SUCCESS LOOKS LIKE AT STAGE 3

Your job is to move from doing everything yourself to having a small team that can help run the business. Here's what you need to do to graduate from Stage 3:



Fix Your Biggest Problem First

- Don't try to fix everything at once
- Find the #1 thing customers complain about
- Fix that one thing really well
- Then move on to the next biggest problem



Get Your Money In Order

- Set up proper payroll for employees
- Start using basic accounting software
- Make sure you're tracking all money coming in and going out
- Have a system for managing bills and getting paid



Help Your Team Help You

- Write down how you do important tasks
- Train your team members properly
- Give them the tools they need to do their jobs
- Check their work to make sure it's done right



Make Your Customers Happy

- Create a proper way to welcome new customers
- Make sure they know how to use your product/service
- Help them get results quickly
- Keep in touch with them regularly

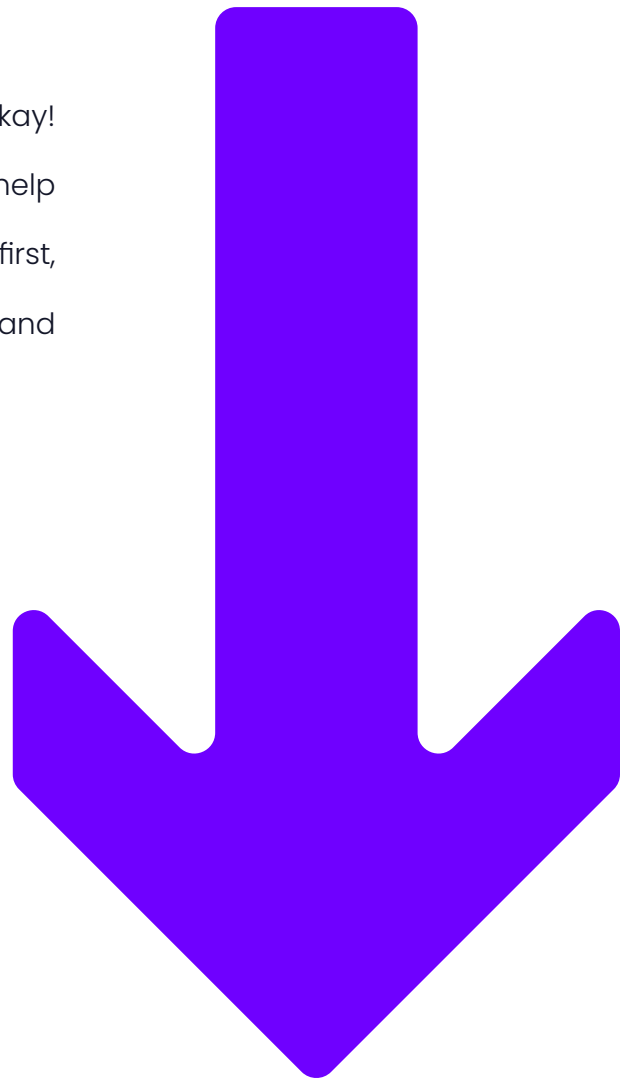
THE BOTTOM LINE

STAGE 3 IS ALL ABOUT GOING FROM CHAOS TO STABILITY.

You can't do everything yourself anymore, and that's okay! Your job is to build a small team and teach them how to help run the business. Focus on fixing the biggest problems first, setting up proper systems for money and employees, and making sure customers get good results.

If you can get through this stage, you'll have a real business with real employees, not just a one-person show. It's hard work, but about 7 million other businesses have done it.

YOU CAN TOO!



REMEMBER

Don't try to fix everything at once. Pick the biggest problem, fix it well, then move on to the next one. That's how you stabilize a growing business.

THE FASTEST WAY TO START AN ONLINE BUSINESS

Rank	User	Group	Last 24h	New MRR
1	Jamie Sea	She Creates Wealth	+\$1,586	\$37,082
2	School of Har...	School of Mentors	+\$1,740	\$31,500
3	Bill Von Fumetti	Keyboard Rich	+\$7,857	\$30,943
4	Stephen G. Po...	No-Code Architects	+\$1,440	\$28,840
5	Timothy Scha...	Producer Academy	+\$997	\$26,919
6	Matteo Parozzi	The Mastermind School	+\$1,994	\$24,519
7	Samuel Millisap	limitless coaching	+\$3,600	\$21,850
8	Elmer Locker Jr	Simulation world	+\$611	\$19,834
9	Nate Trillo	Trading Academy	+\$247	\$18,725
10	Joshua Steil	The Credit Club	+\$5,654	\$17,895

Would you like the fastest way to start an online business? Meet Skool. Skool is an online platform for building a group about whatever you want. Right now 1 out of 2 people who start a paid community on Skool make money. You can get started for free today.

Start For Free

skool.com/GAMES

\$100M SCALING ROADMAP

► STAGE 3: STABILIZE ◀



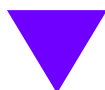
A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 3: STABILIZE



2: ADVERTISE			3: STABILIZE			4: PRIORITIZE		
HEADCOUNT	1		HEADCOUNT	1 to 4				
YOUR ROLE	DOER		YOUR ROLE	TRAINER				
LEADERSHIP STRUCTURE	Freelancers		LEADERSHIP STRUCTURE	First full-time hires				
# OF COMPANIES HERE	30,000,000 (100% of companies)		# OF COMPANIES HERE	7,140,000 (24% of companies)				
CONSTRAINT			CONSTRAINT			TO GRADUATE		
PRODUCT	Paying customers have higher expectations, product is available & not good enough.	Pay it	PRODUCT	No time to fix everything that's wrong.		TO GRADUATE	Fix the thing they complain about most.	
MARKETING	Lead flow is inconsistent (STOP-START)	Live	MARKETING	Leads aren't buying fast enough (colder)		TO GRADUATE	Add long term nurture (emails &/or content)	
SALES	Sales conversions are inconsistent	Not done	SALES	Wasting time with bad leads.		TO GRADUATE	Decide on basic qualifications.	
CUSTOMER SERVICE	Paid customers have higher standards & complain more	Learn to use free tools	CUSTOMER SERVICE	You don't have enough time to talk to good leads.		TO GRADUATE	Outsource setting & calendaring.	
INFORMATION TECH (IT)	You have no money to afford tech.	Convert	CUSTOMER SERVICE	New customers feel lost.		TO GRADUATE	Learn to onboard customers properly.	
RECRUITING	Too much work for part timers.	Convert	INFORMATION TECH (IT)	You have a bunch of different tools that you don't use.		TO GRADUATE	Figure out the useful ones. Extend free trial thru credits/discounts. Cut the rest. Basic sales pipeline.	
HUMAN RESOURCES (HR)	You have FTEs but structured like contractors.	Convert	RECRUITING	Not getting quality applicants.		TO GRADUATE	Learn how to write a job description & review resumes.	
FINANCE	You don't keep track of money or have a way to pay taxes	Convert	HUMAN RESOURCES (HR)	You're not withholding employee taxes and fees.		TO GRADUATE	Get a payroll provider so all taxes and fees by state are handled.	
Bottom line	New customers are inconsistent.		FINANCE	People getting paid informally.		TO GRADUATE	Setup: Payroll processing, basic bookkeeping, managing invoices and payments.	
			Bottom line	There's too much for one person to do.		TO GRADUATE	Get help.	

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 3: STABILIZE

HEADCOUNT	1 to 4	
YOUR ROLE	TRAINER	
LEADERSHIP STRUCTURE	First full-time hires	
# OF COMPANIES HERE	7,140,000 (24% of companies)	
	CONSTRAINT	TO GRADUATE
PRODUCT	No time to fix everything that's wrong.	Fix the thing they complain about most.
MARKETING	Leads aren't buying fast enough (colder)	Add long term nurture (emails &/or content)
SALES	Wasting time with bad leads. You don't have enough time to talk to good leads.	Decide on basic qualifications. Outsource setting & calendaring.
CUSTOMER SERVICE	New customers feel lost.	Learn to onboard customers properly.
INFORMATION TECH (IT)	You have a bunch of different tools that you don't use.	Figure out the useful ones. Extend free trial thru credits/discounts. Cut the rest. Basic sales pipeline.
RECRUITING	Not getting quality applicants.	Learn how to write a job description & review resumes.
HUMAN RESOURCES (HR)	You're not withholding employee taxes and fees.	Get a payroll provider so all taxes and fees by state are handled.
FINANCE	People getting paid informally.	Setup: Payroll processing, basic bookkeeping, managing invoices and payments.
Bottom line	There's too much for one person to do.	Get help.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



Repeat themes to be aware of



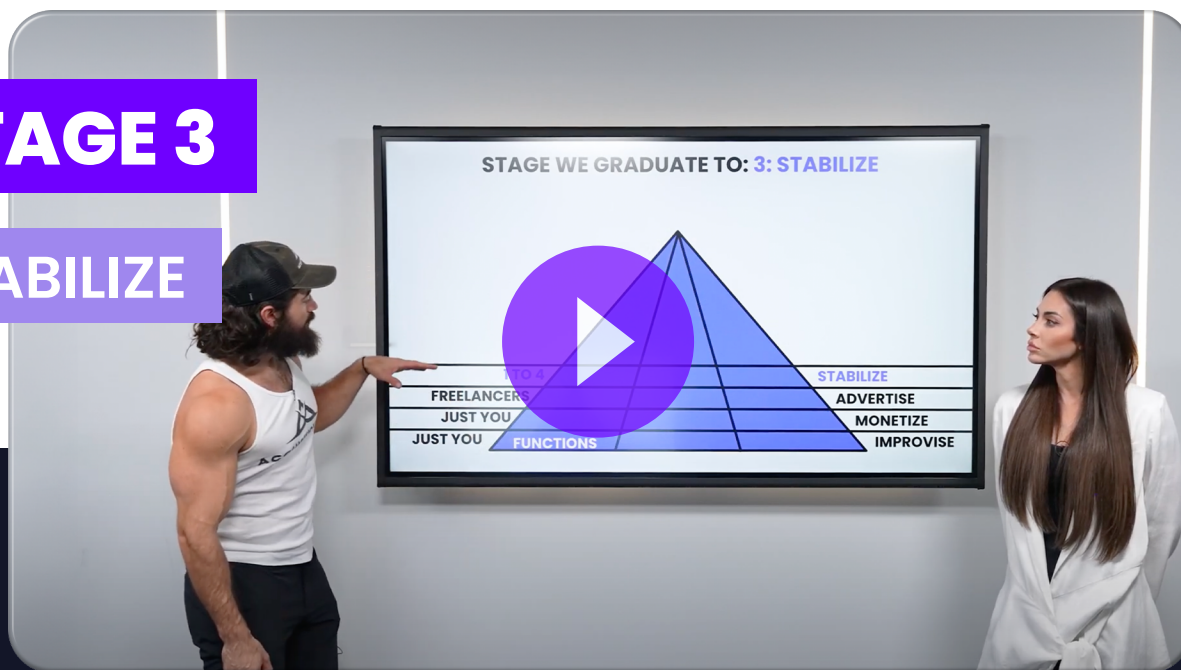
How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE

STAGE 3

STABILIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 3**



YOUR ROLE

TRAINER



HEADCOUNT

1 to 4



BOTTOM LINE

There's too much for
one person to do



GRADUATE BY

Get help

WHEN YOU HIT “STAGE 3: STABILIZE”

You’ve made it! You have your first 1-4 full-time employees. About 24% of businesses (around 7 million companies) reach this level. This is when you go from doing everything yourself to having real employees. Your role changes from “doer” to “trainer” because now you have to teach others how to help run the business.

THE BIG CHALLENGE: TOO MUCH WORK, NOT ENOUGH TIME

The main problem at Stage 3 is simple – there’s way too much work for one person to handle. That’s why it’s called the “Stabilize” stage. Everything feels a bit chaotic and you need to make things more stable. Let’s look at what’s happening in each part of the business:

Products and Customers

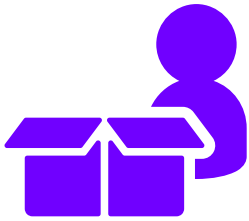
Sales and Service

Tech and Tools

People and HR

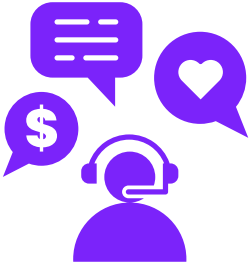
Money Matters





Products & Customers

- Your biggest headache is that you can't fix everything customers complain about
- You have to pick the ONE thing that bothers customers the most and fix just that
- Your leads (potential customers) aren't buying as quickly because they don't know you as well
- You need to start sending emails and creating content to build trust over time



Sales and Service

- You're wasting time talking to people who aren't serious about buying
- You need to make a list of what makes someone a "good" potential customer
- New customers often feel lost when they start using your product/service
- You need to create a proper way to welcome and guide new customers



Tech and Tools

- You probably bought too many different software tools thinking you'd use them all
- Now you need to figure out which ones you actually need and cancel the rest
- You should try to extend free trials or get discounts on the tools you keep
- You need a basic system to track your sales pipeline



People and HR

- It's hard to find good people to hire
- You need to learn how to write good job descriptions and review resumes properly
- You're probably not handling employee taxes correctly
- You need to get a payroll service to handle taxes and fees properly

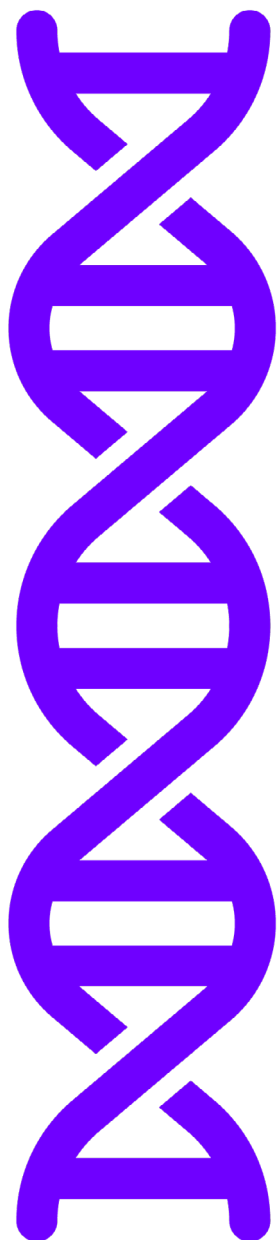


Customer Service

- People are getting paid informally (which isn't good)
- You need to set up proper payroll processing
- You need basic bookkeeping to track money coming in and going out
- You need to manage invoices and payments properly

WHAT SUCCESS LOOKS LIKE AT STAGE 3

Your job is to move from doing everything yourself to having a small team that can help run the business. Here's what you need to do to graduate from Stage 3:



Fix Your Biggest Problem First

- Don't try to fix everything at once
- Find the #1 thing customers complain about
- Fix that one thing really well
- Then move on to the next biggest problem



Get Your Money In Order

- Set up proper payroll for employees
- Start using basic accounting software
- Make sure you're tracking all money coming in and going out
- Have a system for managing bills and getting paid



Help Your Team Help You

- Write down how you do important tasks
- Train your team members properly
- Give them the tools they need to do their jobs
- Check their work to make sure it's done right



Make Your Customers Happy

- Create a proper way to welcome new customers
- Make sure they know how to use your product/service
- Help them get results quickly
- Keep in touch with them regularly

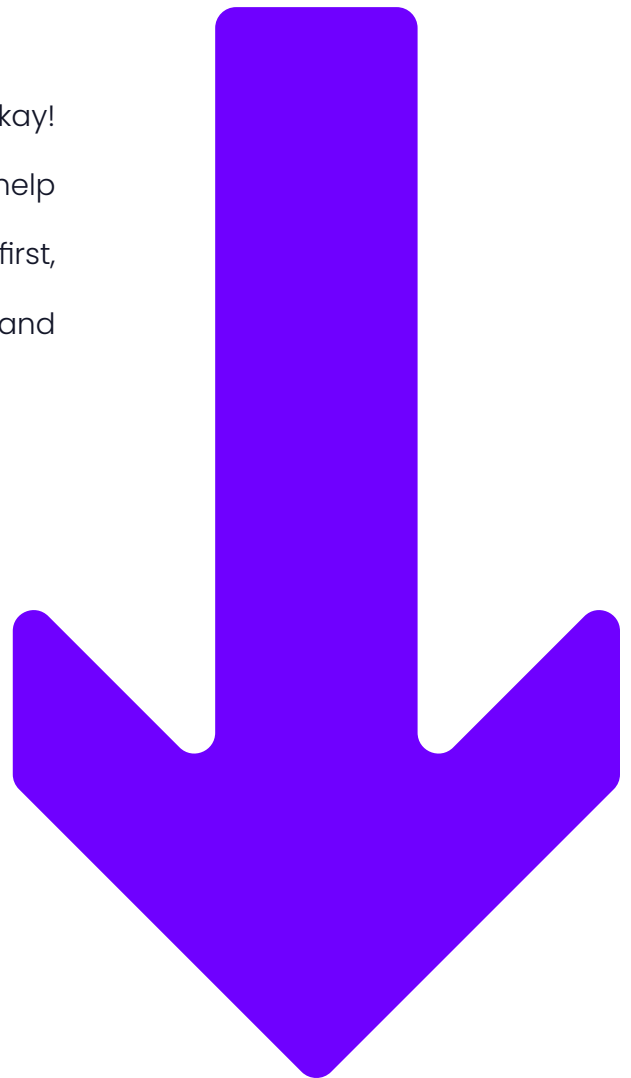
THE BOTTOM LINE

STAGE 3 IS ALL ABOUT GOING FROM CHAOS TO STABILITY.

You can't do everything yourself anymore, and that's okay! Your job is to build a small team and teach them how to help run the business. Focus on fixing the biggest problems first, setting up proper systems for money and employees, and making sure customers get good results.

If you can get through this stage, you'll have a real business with real employees, not just a one-person show. It's hard work, but about 7 million other businesses have done it.

YOU CAN TOO!



REMEMBER

Don't try to fix everything at once. Pick the biggest problem, fix it well, then move on to the next one. That's how you stabilize a growing business.

DO YOU WANT TO SCALE TO THE NEXT STEP?



Over 24% of businesses get stuck here. There's too much for one person to do and the only way to reach the next level is to get help. If you want our advice on how to find a team for your business, check out one of our Scaling Workshops. You can grab a seat below.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...



STAGE 2: ADVERTISE

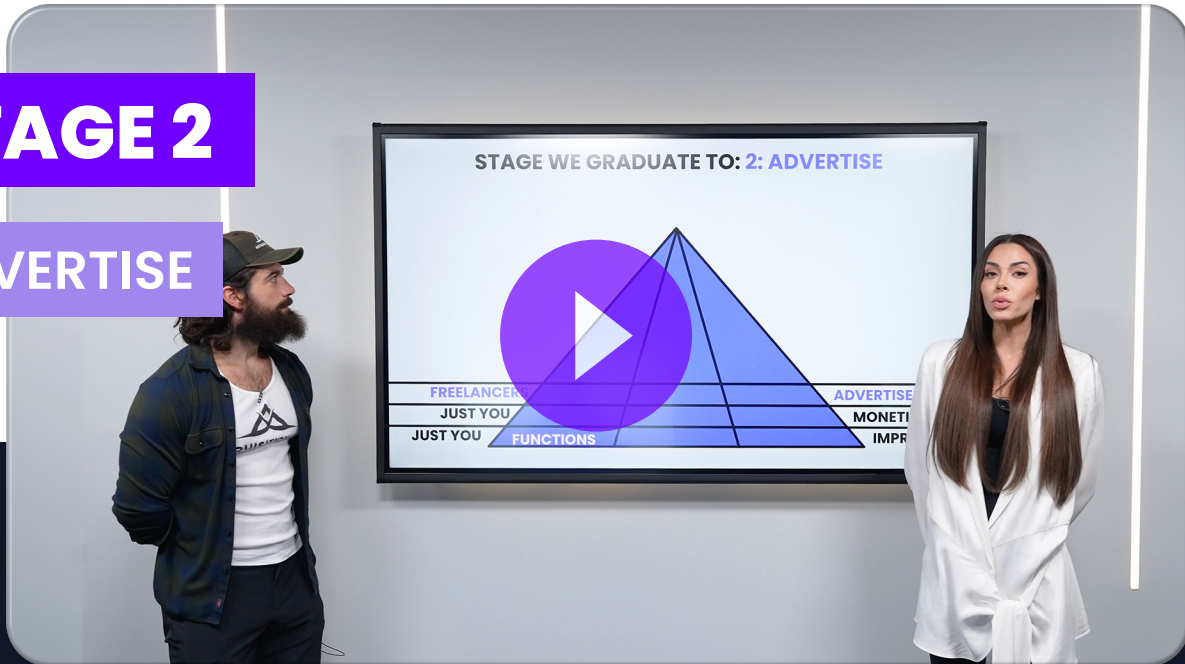
STAGE 2: ADVERTISE

HEADCOUNT	1	
YOUR ROLE	DOER	
LEADERSHIP STRUCTURE	Freelancers	
# OF COMPANIES HERE	30,000,000 (100% of companies)	
	CONSTRAINT	TO GRADUATE
PRODUCT	Paying customers have higher expectations, product is <u>unreliable</u> & not good enough.	Fix it good enough for now in an unscalable way.
MARKETING	Lead flow is inconsistent (STOP:START)	Live by the Rule of 100. Prioritize advertising daily.
SALES	Sales conversions are inconsistent	Nail down a script for setting and closing – CLOSER & ACA.
CUSTOMER SERVICE	Paid customers have higher standards & complain more.	Learn to deal with disappointed customers (Angry boat). Get testimonials from happy customers. (Epiphany script)
INFORMATION TECH (IT)	You have no money to afford tech.	Use free tech (google suite) and get free trials/credits for starter softwares. Website/hosting. Starter CRM/POS.
RECRUITING	Too much work for part timers.	Convert part timers to FTers, make public posts, or run ads on job boards to get full timers.
HUMAN RESOURCES (HR)	You have FTEs but structured like contractors.	Setup W-2 and 1099s.
FINANCE	You don't keep track of money or have a way to pay taxes.	Spin up quickbooks equivalent. Save for taxes. Check your bank account daily.
Bottom line	New customers are inconsistent.	Let more people know about your stuff.

YOUR STAGE

STAGE 2

ADVERTISE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 2**



YOUR ROLE

DOER



HEADCOUNT

1



BOTTOM LINE

New customers
are inconsistent



GRADUATE BY

Let more people know
about your stuff

WHEN YOU HIT “STAGE 2: ADVERTISE”

Welcome to Stage 2: The “Advertise” stage! You’ve made your first sales, and now it’s time to tell more people about your business. Think of this like moving from having a food stand that only your friends know about to actually advertising to get new customers who’ve never heard of you.

THE BIG PICTURE:

In this stage, you’re what we call a “doer” – someone who’s actively running their business and starting to use freelancers for help. You’re still the main person, but now you’re beginning to get part-time help. They give you some time back and help you with tasks you don’t have the skills (or desire) to do. All businesses that survive reach this stage, so you’re in good company.

Your Main Challenge: Product

Marketing Challenges

Sales Challenges

Customer Service

Technology Needs

Getting Help

Managing People

Money Management

Daily Life at Stage 2

Common Feelings at This Stage





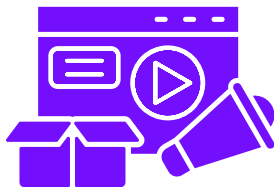
Your Main Challenge: Product

Your paying customers are much pickier than your free ones were! They have higher expectations, and your product might not be reliable enough yet. Maybe your food service is sometimes great but sometimes inconsistent, or your computer repair work takes different amounts of time for similar problems.

The key here is to fix things in an “unscalable way.” This means doing whatever it takes to make customers happy, even if it’s not efficient. You might need to:

- Work longer hours to get things perfect
- Double-check everything
- Provide extra service at no charge
- Fix problems immediately when they come up

Think: driving to the convenience store to drop off ice cream to a customer’s house at 2AM. The point is to be valuable, not scalable yet.

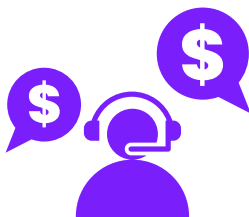


Marketing Challenges

Your biggest problem now is that your customer flow is inconsistent – sometimes you’re too busy, sometimes too quiet. It’s like having a restaurant that’s packed on weekends but empty on weekdays.

You need to:

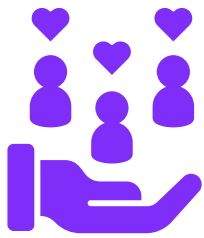
- Follow the “Rule of 100” (spend 100 minutes daily on marketing)
- Make marketing a daily priority, not just when you’re slow. (Get ahead)
- Keep track of what brings in customers (actions & results).
- Test different ways of reaching people. Stick with the one that works best for you. Don’t try and diversify in the beginning. Double down on what works.



Sales Challenges

Sales are up and down, and you need to fix that. It’s time to:

- Create a consistent sales script
- Learn the “CLOSER” method for converting leads
- Practice your pitch until it’s natural
- Track what works and what doesn’t



Customer Service

Paying customers complain more and have higher standards. You need to:

- Learn to handle upset customers (using the “Angry Boat” method)
- Get testimonials from happy customers using the “Epiphany Script”
- Turn complaints into improvements
- Make every customer feel special



Technology Needs

Money is tight, but you need basic tools. Focus on:

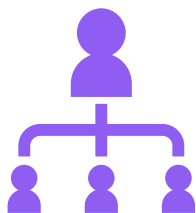
- Using free trials and credits
- Getting basic website/hosting
- Setting up a simple CRM (customer management system)
- Using free Google tools



Getting Help

Your part-timers aren't enough anymore. You need to:

- Start converting part-timers to full-time employees
- Post job ads
- Look for people who want steady work
- Be clear about expectations



Managing People

Now that you have help, you need to:

- Set up proper employment paperwork (W2s and 1099s)
- Create basic training
- Establish work schedules
- Make responsibilities clear



Money Management

Things are getting more complex with money. You need to:

- Set up QuickBooks or similar accounting software
- Save money for taxes
- Check your bank account daily
- Keep track of all expenses
- Start planning for bigger expenses



Your Daily Life at Stage 2

Your typical day might include:

- Serving existing customers
- Marketing for new customers
- Managing part-time help
- Handling money
- Fixing problems
- Improving your product/service
- Talking to potential customers



Common Feelings at This Stage

- Overwhelmed by all the moving parts
- Excited about growth
- Worried about consistency
- Proud of becoming a “real” business
- Stressed about managing others
- Concerned about money flow

SIGNS YOU'RE DOING IT WELL

Customers are coming back

New customers are finding you

Your help is reliable

Money is steady (even if not huge)

Systems are starting to work

Problems get fixed quickly

WARNING SIGNS TO WATCH FOR

Inconsistent quality

Customer complaints increasing

Money problems

Helper turnover

Feeling constantly behind

Too many emergencies

THE KEYS TO SUCCESS:



GRADUATING FROM STAGE 2

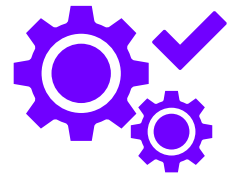
YOU'RE READY FOR STAGE 3 WHEN:



QUALITY IS
CONSISTENT



NEW CUSTOMERS
COME REGULARLY



SYSTEMS ARE
WORKING



MONEY IS
ORGANIZED



HELP IS
RELIABLE



MARKETING
IS STEADY

REMEMBER

This stage is about creating stability and systems. You're moving from "figuring it out" to "doing it right." It might feel slower than you want, but building these foundations is crucial.

THE BIG PICTURE GOAL:

Your main goal in Stage 2 is to get more people to know about your business in a consistent way. You're not just serving customers anymore - you're building a real business that can grow.

FINAL THOUGHTS

Stage 2 is where many businesses start to feel “real.” You’re not just selling something – you’re running a proper business. Take your time, build good habits, and focus on consistency. Every successful business went through this stage, so you’re on the right path!

This stage can feel like a juggling act, but it’s where you learn to be a true business owner. Stay focused on quality, keep marketing daily, and build systems that will support your growth. The more solid your foundation here, the easier your next stages will be.

THIS IS WHAT'S COMING NEXT...



STAGE 4: PRIORITIZE

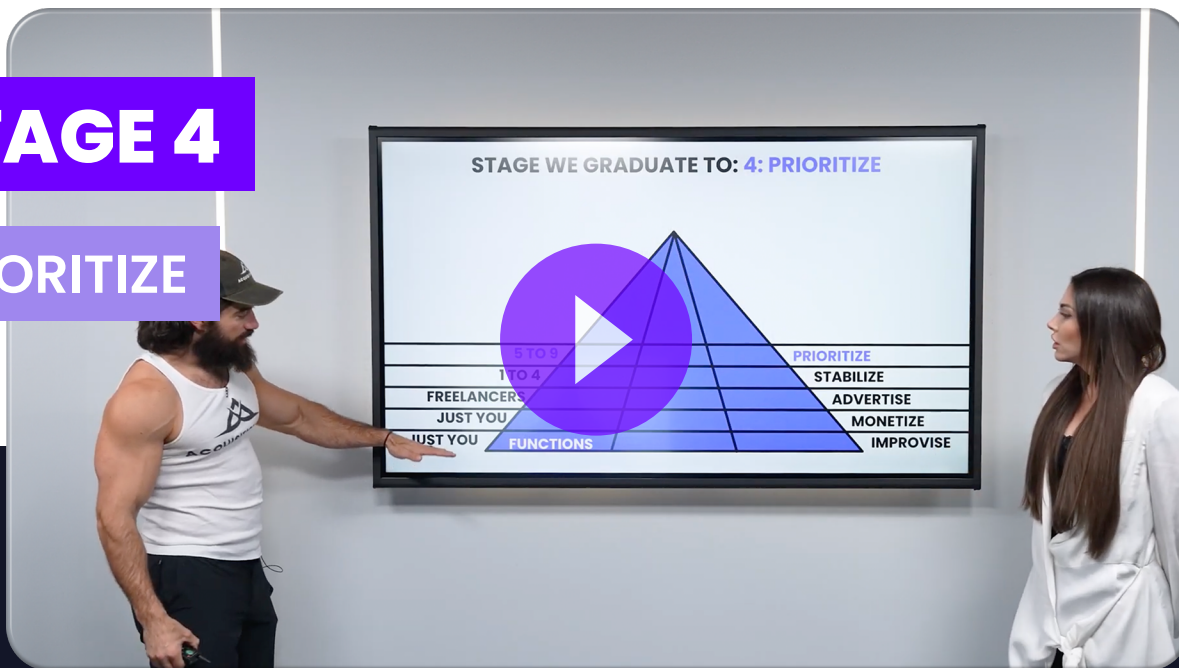
STAGE 4: PRIORITIZE

HEADCOUNT	5 to 9	
YOUR ROLE	Manager	
LEADERSHIP STRUCTURE	1 Layer: First Team	
# OF COMPANIES HERE	3,000,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	You said yes to anyone who would pay. Feedback from so many different customers creates too many product directions.	Specialize product (v2) & price to serve niched down avatar.
MARKETING	Too many unqualified leads	Make better free stuff & more creative to boost volume. Add qualification/friction so the extra volume self-selects.
SALES	Speed to contact drops. You have no metrics around sales.	Track basic KPIs manually on spreadsheet (contact rate, sched, show, offer, close, cash collected).
CUSTOMER SERVICE	No metrics for customer success.	Install tracking & KPIs. Record and centralize notes for each customer in a CRM.
INFORMATION TECH (IT)	New team isn't using everything.	Get everyone on platforms. Protect passwords. Get project management tool & comms (work chat tool).
RECRUITING	Wasting time with bad candidates.	Learn how to conduct a proper interview and check references.
HUMAN RESOURCES (HR)	Employees don't know how to behave (PTO, sick days, dress code, code of conduct).	Employee handbook & policies.
FINANCE	Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.	Get profit and loss statements and cash flow statements setup. Get basic business insurance.
Bottom line	Trying to be everything to everyone.	Niche down to serve only people like your best customers.

YOUR STAGE

STAGE 4

PRIORITIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 4**



YOUR ROLE

MANAGER



HEADCOUNT

5 to 9



BOTTOM LINE

Trying to be
everything to
everyone



GRADUATE BY

Niche down to
serve only people
like your best
customers

WHEN YOU HIT “STAGE 4: PRIORITIZE”

Welcome to having 5–9 employees! About 3 million businesses reach this level. This is when you change from being a “trainer” to becoming a real “manager.” You’ll have your first real team, with one layer of organization between you and the front-line workers. The big difference? You can’t do everything anymore – you have to choose what matters most.

THE BIG CHALLENGE: TRYING TO PLEASE EVERYONE

The main problem at Stage 4 is that you’ve been saying “yes” to any customer who would pay you. Now that’s causing problems because different customers want different things. That’s why it’s called the “Prioritize” stage – you need to figure out who your best customers are and focus on them.

Let’s break down what’s happening:

Products and Customers

Marketing and Sales

Customer Service

Tech and Tools

People and HR

Money Matters





Products & Customers

- You've said yes to anyone who would pay, and now your product is pulled in too many directions
- You need to choose a specific type of customer to focus on
- You need to update your product to serve just those ideal customers
- You might need to raise your prices to match your specialized service



Marketing & Sales

- You're getting too many unqualified leads (people who aren't right for your business)
- You need to create better free content to attract the right people
- Your sales team isn't following up with leads quickly enough
- You need to start tracking basic sales numbers like how many calls you make and how many people buy



Customer Service

- You have no way to measure if customers are happy
- You need to start tracking customer satisfaction
- Customer information is scattered everywhere
- You need a proper system (CRM) to keep track of customer notes and interactions



Tech and Tools

- Your new team isn't using all the tools properly
- You need to get everyone on the same platforms
- You need to protect passwords and data
- You need project management and team chat tools



People and HR

- You're wasting time interviewing people who aren't right for the job
- You need to learn how to interview properly and check references
- Employees don't know basic rules about time off, dress code, etc.
- You need to create an employee handbook with basic policies

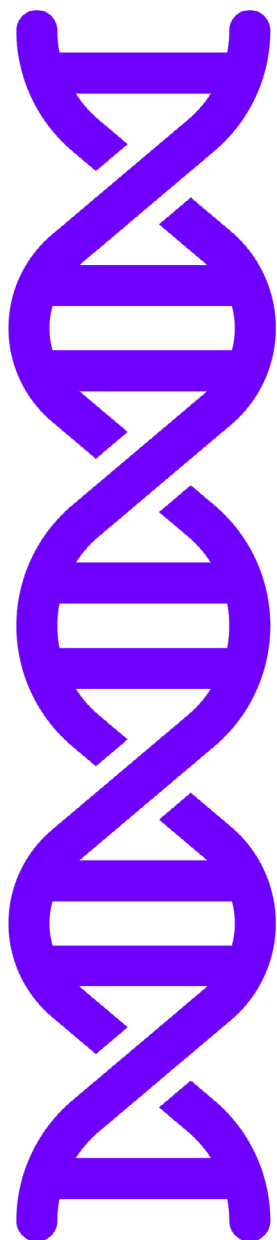


Money Matters

- You keep getting surprised by "one-time" expenses
- You're learning that running a business costs more than you thought
- You need proper profit and loss statements
- You need basic business insurance

WHAT SUCCESS LOOKS LIKE AT STAGE 4

Your job is to make the business more focused and professional. Here's what you need to do to graduate from Stage 4:



Choose Your Focus

- Figure out who your best customers are
- Change your product to serve them better
- Stop trying to please everyone
- Be willing to say “no” to customers who aren’t a good fit



Get Organized

- Set up proper systems for tracking sales
- Keep all customer information in one place
- Make sure everyone uses the same tools
- Create basic rules and policies



Start Measuring Things

- Track how many leads turn into sales
- Measure customer satisfaction
- Monitor how quickly you respond to leads
- Keep track of basic financial numbers



Make Things Professional

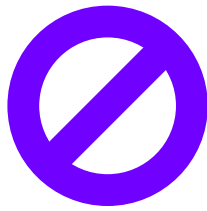
- Write an employee handbook
- Set up proper insurance
- Create basic processes for everything
- Start running your business like a real company

THE BOTTOM LINE

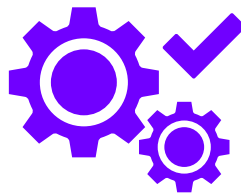
STAGE 4 IS ALL ABOUT FOCUS AND PRIORITIES. YOU CAN'T SERVE EVERYONE, AND YOU CAN'T DO EVERYTHING. YOU NEED TO CHOOSE WHAT'S MOST IMPORTANT AND FOCUS ON THAT. THIS MEANS:



**PICKING
YOUR IDEAL
CUSTOMERS**



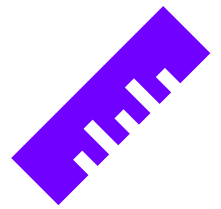
**SAYING
NO TO
OTHERS**



**SETTING
UP BASIC
SYSTEMS**



**CREATING
CLEAR
RULES**



**MEASURING
WHAT
MATTERS**

This is when your business starts feeling like a real company instead of just a group of people working together. It's when you stop trying to please everyone and start focusing on being really good at serving specific types of customers.

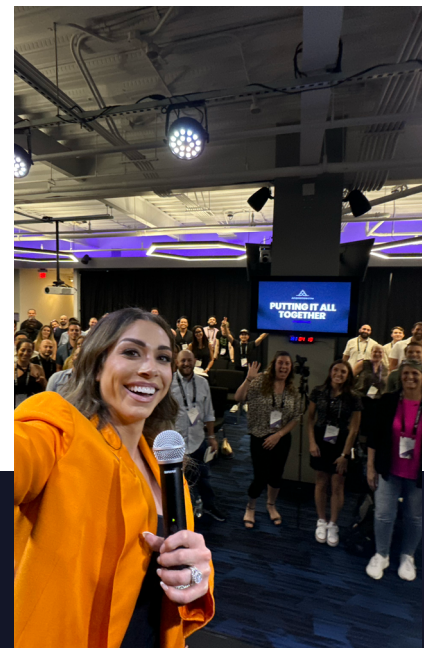
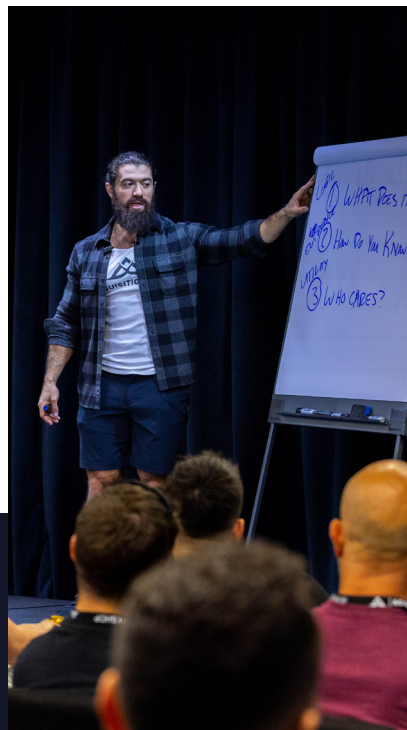
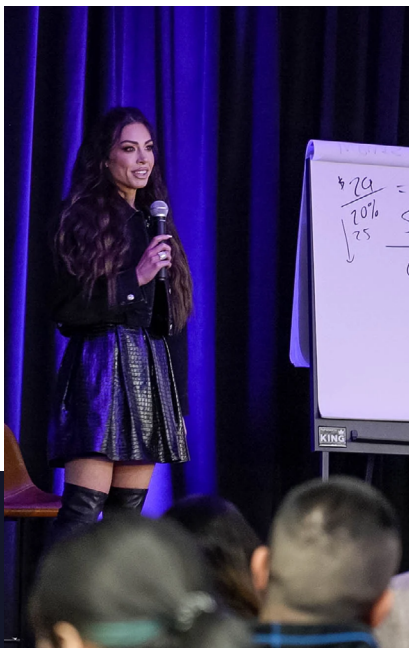
REMEMBER

The key to Stage 4 is learning to say “no.” No to customers who aren't right for you. No to projects that don't fit. No to doing everything yourself. That's how you build a focused, successful business that can grow even bigger.

It's a hard transition because saying “no” means turning down money in the short term. But it's necessary if you

want to build something bigger in the long term. About 3 million businesses have made this transition successfully. If you stay focused on serving your best customers really well, you will too.

DO YOU WANT TO SCALE TO THE NEXT STEP?



Over 24% of businesses get stuck here. There's too much for one person to do and the only way to reach the next level is to get help. If you want our advice on how to find a team for your business, check out one of our Scaling Workshops. You can grab a seat below.

 Check Dates

\$100M SCALING ROADMAP

► STAGE 4: PRIORITIZE ◀



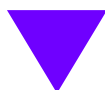
A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 4: PRIORITIZE



3: STABILIZE		4: PRIORITIZE		5: PRODUCTIZE	
HEADCOUNT	1 to 4	HEADCOUNT	5 to 9		
YOUR ROLE	TRAINER	YOUR ROLE	Manager		
LEADERSHIP STRUCTURE	First full-time hires	LEADERSHIP STRUCTURE	1 Layer: First Team		
# OF COMPANIES HERE	7,140,000 (24% of companies)	# OF COMPANIES HERE	3,000,000		
CONSTRAINT		CONSTRAINT		CONSTRAINT	
PRODUCT	No time to fix everything that's wrong.	PRODUCT	You said yes to anyone who would pay. Feedback from so many different customers creates too many product directions.	PRODUCT	Try to do too much for you & them.
MARKETING	Leads aren't buying fast enough (colder).	MARKETING	Too many unqualified leads.	MARKETING	Spending too much on advertising and not getting the right leads.
SALES	You don't have enough time to talk to good leads.	SALES	Speed to contact drops. You have no metrics around sales.	SALES	Too many sales calls/emails. Not enough time to follow up.
CUSTOMER SERVICE	New customers feel lost.	CUSTOMER SERVICE	No metrics for customer success.	CUSTOMER SERVICE	Too many customer complaints and not enough resolution.
INFORMATION TECH (IT)	You have a bunch of different tools that you don't use.	INFORMATION TECH (IT)	New team isn't using everything.	INFORMATION TECH (IT)	Too many IT projects and not enough completion.
RECRUITING	Not getting quality applicants.	RECRUITING	Wasting time with bad candidates.	RECRUITING	Too many bad hires and not enough quality.
HUMAN RESOURCES (HR)	You're not withholding employee taxes and fees.	HUMAN RESOURCES (HR)	Employees don't know how to behave (PTO, sick days, dress code, code of conduct).	HUMAN RESOURCES (HR)	Too many HR policies and not enough enforcement.
FINANCE	People getting paid informally.	FINANCE	Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.	FINANCE	Too many expenses and not enough revenue.
Bottom line	There's too much for one person to do.	Bottom line	Trying to be everything to everyone.	Bottom line	Too many products and not enough focus.
			Niche down to serve only people like your best customers.		

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 4: PRIORITIZE

HEADCOUNT	5 to 9	
YOUR ROLE	Manager	
LEADERSHIP STRUCTURE	1 Layer: First Team	
# OF COMPANIES HERE	3,000,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	You said yes to anyone who would pay. Feedback from so many different customers creates too many product directions.	Specialize product (v2) & price to serve niched down avatar.
MARKETING	Too many unqualified leads	Make better free stuff & more creative to boost volume. Add qualification/friction so the extra volume self-selects.
SALES	Speed to contact drops. You have no metrics around sales.	Track basic KPIs manually on spreadsheet (contact rate, sched, show, offer, close, cash collected).
CUSTOMER SERVICE	No metrics for customer success.	Install tracking & KPIs. Record and centralize notes for each customer in a CRM.
INFORMATION TECH (IT)	New team isn't using everything.	Get everyone on platforms. Protect passwords. Get project management tool & comms (work chat tool).
RECRUITING	Wasting time with bad candidates.	Learn how to conduct a proper interview and check references.
HUMAN RESOURCES (HR)	Employees don't know how to behave (PTO, sick days, dress code, code of conduct).	Employee handbook & policies.
FINANCE	Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.	Get profit and loss statements and cash flow statements setup. Get basic business insurance.
Bottom line	Trying to be everything to everyone.	Niche down to serve only people like your best customers.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



Repeat themes to be aware of



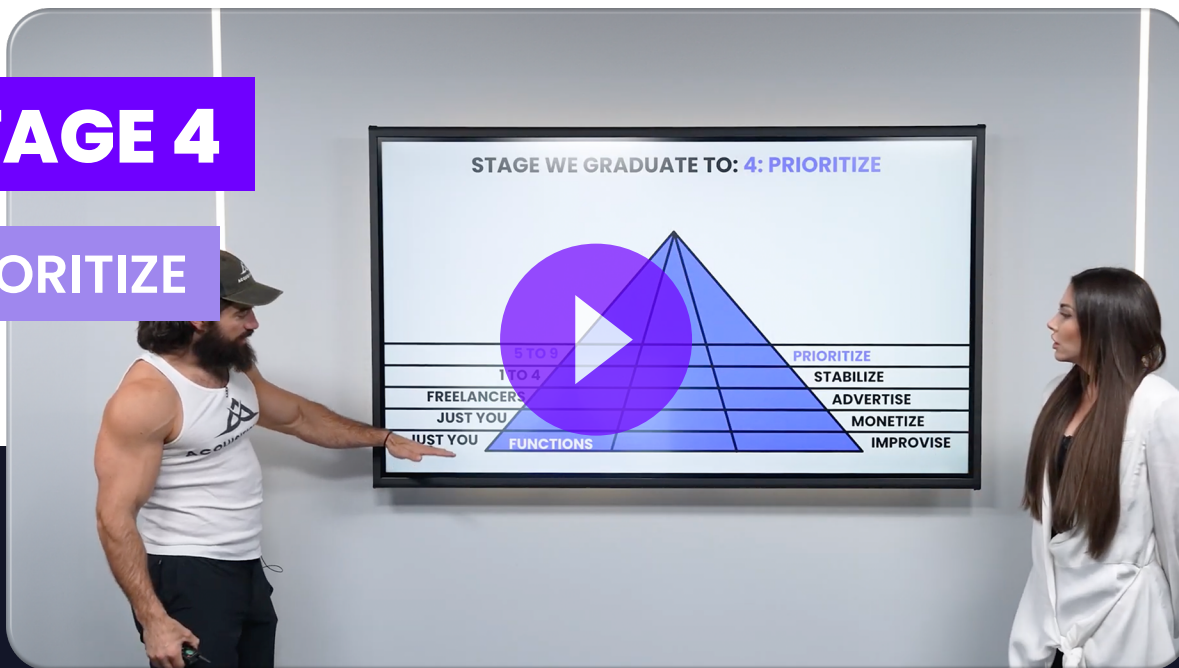
How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE

STAGE 4

PRIORITIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 4**



YOUR ROLE

MANAGER



HEADCOUNT

5 to 9



BOTTOM LINE

Trying to be
everything to
everyone



GRADUATE BY

Niche down to
serve only people
like your best
customers

WHEN YOU HIT “STAGE 4: PRIORITIZE”

Welcome to having 5–9 employees! About 3 million businesses reach this level. This is when you change from being a “trainer” to becoming a real “manager.” You’ll have your first real team, with one layer of organization between you and the front-line workers. The big difference? You can’t do everything anymore – you have to choose what matters most.

THE BIG CHALLENGE: TRYING TO PLEASE EVERYONE

The main problem at Stage 4 is that you’ve been saying “yes” to any customer who would pay you. Now that’s causing problems because different customers want different things. That’s why it’s called the “Prioritize” stage – you need to figure out who your best customers are and focus on them. Let’s break down what’s happening:

Products and Customers

Marketing and Sales

Customer Service

Tech and Tools

People and HR

Money Matters





Products & Customers

- You've said yes to anyone who would pay, and now your product is pulled in too many directions
- You need to choose a specific type of customer to focus on
- You need to update your product to serve just those ideal customers
- You might need to raise your prices to match your specialized service



Marketing & Sales

- You're getting too many unqualified leads (people who aren't right for your business)
- You need to create better free content to attract the right people
- Your sales team isn't following up with leads quickly enough
- You need to start tracking basic sales numbers like how many calls you make and how many people buy



Customer Service

- You have no way to measure if customers are happy
- You need to start tracking customer satisfaction
- Customer information is scattered everywhere
- You need a proper system (CRM) to keep track of customer notes and interactions



Tech and Tools

- Your new team isn't using all the tools properly
- You need to get everyone on the same platforms
- You need to protect passwords and data
- You need project management and team chat tools



People and HR

- You're wasting time interviewing people who aren't right for the job
- You need to learn how to interview properly and check references
- Employees don't know basic rules about time off, dress code, etc.
- You need to create an employee handbook with basic policies

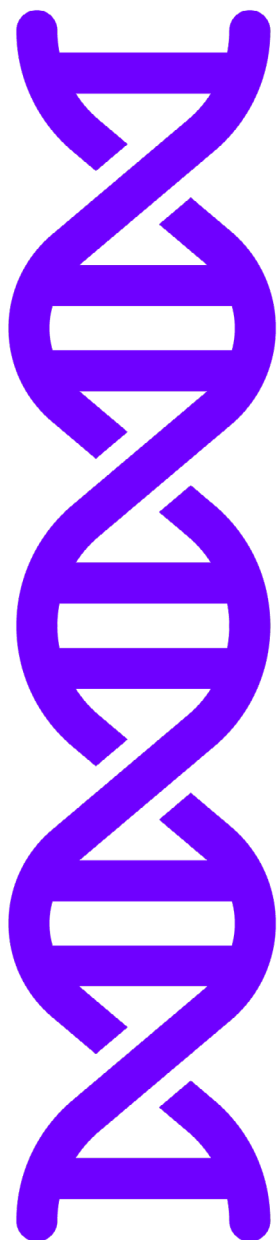


Money Matters

- You keep getting surprised by "one-time" expenses
- You're learning that running a business costs more than you thought
- You need proper profit and loss statements
- You need basic business insurance

WHAT SUCCESS LOOKS LIKE AT STAGE 4

Your job is to make the business more focused and professional. Here's what you need to do to graduate from Stage 4:



Choose Your Focus

- Figure out who your best customers are
- Change your product to serve them better
- Stop trying to please everyone
- Be willing to say "no" to customers who aren't a good fit



Get Organized

- Set up proper systems for tracking sales
- Keep all customer information in one place
- Make sure everyone uses the same tools
- Create basic rules and policies



Start Measuring Things

- Track how many leads turn into sales
- Measure customer satisfaction
- Monitor how quickly you respond to leads
- Keep track of basic financial numbers



Make Things Professional

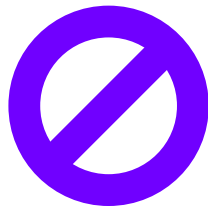
- Write an employee handbook
- Set up proper insurance
- Create basic processes for everything
- Start running your business like a real company

THE BOTTOM LINE

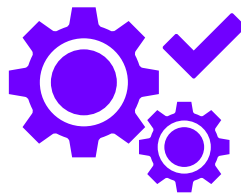
STAGE 4 IS ALL ABOUT FOCUS AND PRIORITIES. YOU CAN'T SERVE EVERYONE, AND YOU CAN'T DO EVERYTHING. YOU NEED TO CHOOSE WHAT'S MOST IMPORTANT AND FOCUS ON THAT. THIS MEANS:



**PICKING
YOUR IDEAL
CUSTOMERS**



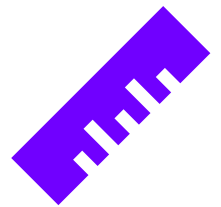
**SAYING
NO TO
OTHERS**



**SETTING
UP BASIC
SYSTEMS**



**CREATING
CLEAR
RULES**



**MEASURING
WHAT
MATTERS**

This is when your business starts feeling like a real company instead of just a group of people working together. It's when you stop trying to please everyone and start focusing on being really good at serving specific types of customers.

REMEMBER

The key to Stage 4 is learning to say "no." No to customers who aren't right for you. No to projects that don't fit. No to doing everything yourself. That's how you build a focused, successful business that can grow even bigger.

It's a hard transition because saying "no" means turning down money in the short term. But it's necessary if you

want to build something bigger in the long term. About 3 million businesses have made this transition successfully. If you stay focused on serving your best customers really well, you will too.

DO YOU WANT TO SCALE TO THE NEXT STEP?



Trying to be everything to everyone? You need to niche down to serve only people like your best customers. A lot of businesses do lots of activity and they don't grow because they're solving the wrong problems – for the wrong person. If you want our help to select the right avatar, you can grab a seat at one of our next available workshops.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...



STAGE 3: STABILIZE

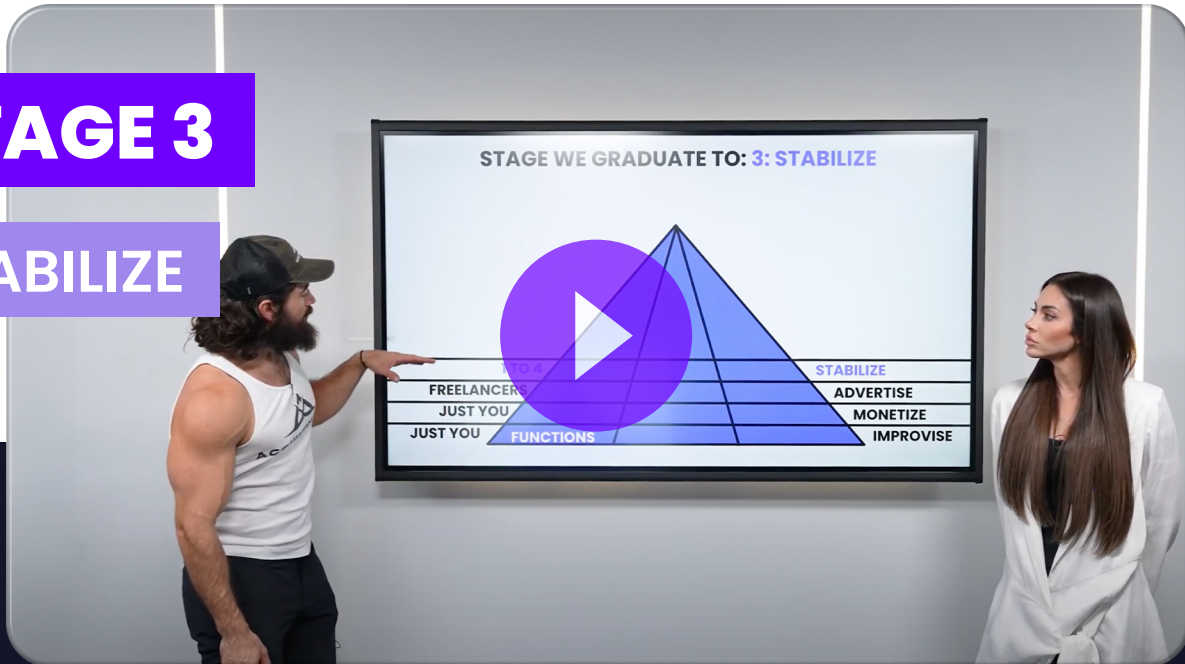
STAGE 3: STABILIZE

HEADCOUNT	1 to 4	
YOUR ROLE	TRAINER	
LEADERSHIP STRUCTURE	First full-time hires	
# OF COMPANIES HERE	7,140,000 (24% of companies)	
	CONSTRAINT	TO GRADUATE
PRODUCT	No time to fix everything that's wrong.	Fix the thing they complain about most.
MARKETING	Leads aren't buying fast enough (colder)	Add long term nurture (emails &/or content)
SALES	Wasting time with bad leads. You don't have enough time to talk to good leads.	Decide on basic qualifications. Outsource setting & calendaring.
CUSTOMER SERVICE	New customers feel lost.	Learn to onboard customers properly.
INFORMATION TECH (IT)	You have a bunch of different tools that you don't use.	Figure out the useful ones. Extend free trial thru credits/discounts. Cut the rest. Basic sales pipeline.
RECRUITING	Not getting quality applicants.	Learn how to write a job description & review resumes.
HUMAN RESOURCES (HR)	You're not withholding employee taxes and fees.	Get a payroll provider so all taxes and fees by state are handled.
FINANCE	People getting paid informally.	Setup: Payroll processing, basic bookkeeping, managing invoices and payments.
Bottom line	There's too much for one person to do.	Get help.

YOUR STAGE

STAGE 3

STABILIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 3**



YOUR ROLE

TRAINER



HEADCOUNT

1 to 4



BOTTOM LINE

There's too much for
one person to do



GRADUATE BY

Get help

WHEN YOU HIT “STAGE 3: STABILIZE”

You’ve made it! You have your first 1-4 full-time employees. About 24% of businesses (around 7 million companies) reach this level. This is when you go from doing everything yourself to having real employees. Your role changes from “doer” to “trainer” because now you have to teach others how to help run the business.

THE BIG CHALLENGE: TOO MUCH WORK, NOT ENOUGH TIME

The main problem at Stage 3 is simple – there’s way too much work for one person to handle. That’s why it’s called the “Stabilize” stage. Everything feels a bit chaotic and you need to make things more stable. Let’s look at what’s happening in each part of the business:

Products and Customers

Sales and Service

Tech and Tools

People and HR

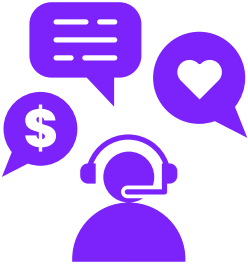
Money Matters





Products & Customers

- Your biggest headache is that you can't fix everything customers complain about
- You have to pick the ONE thing that bothers customers the most and fix just that
- Your leads (potential customers) aren't buying as quickly because they don't know you as well
- You need to start sending emails and creating content to build trust over time



Sales and Service

- You're wasting time talking to people who aren't serious about buying
- You need to make a list of what makes someone a "good" potential customer
- New customers often feel lost when they start using your product/service
- You need to create a proper way to welcome and guide new customers



Tech and Tools

- You probably bought too many different software tools thinking you'd use them all
- Now you need to figure out which ones you actually need and cancel the rest
- You should try to extend free trials or get discounts on the tools you keep
- You need a basic system to track your sales pipeline



People and HR

- It's hard to find good people to hire
- You need to learn how to write good job descriptions and review resumes properly
- You're probably not handling employee taxes correctly
- You need to get a payroll service to handle taxes and fees properly

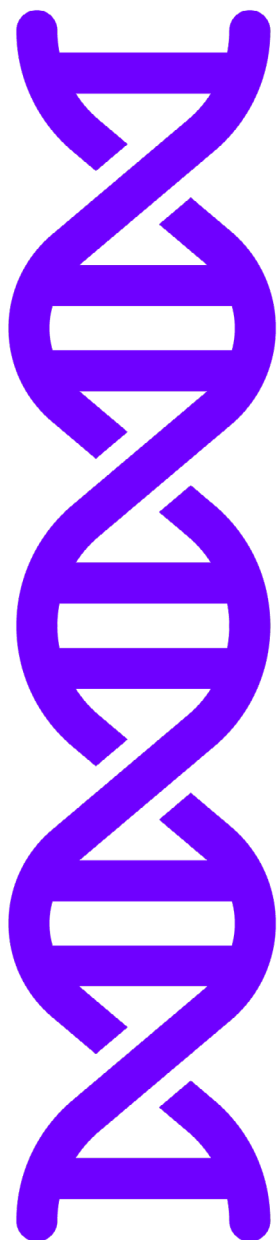


Customer Service

- People are getting paid informally (which isn't good)
- You need to set up proper payroll processing
- You need basic bookkeeping to track money coming in and going out
- You need to manage invoices and payments properly

WHAT SUCCESS LOOKS LIKE AT STAGE 3

Your job is to move from doing everything yourself to having a small team that can help run the business. Here's what you need to do to graduate from Stage 3:



Fix Your Biggest Problem First

- Don't try to fix everything at once
- Find the #1 thing customers complain about
- Fix that one thing really well
- Then move on to the next biggest problem



Get Your Money In Order

- Set up proper payroll for employees
- Start using basic accounting software
- Make sure you're tracking all money coming in and going out
- Have a system for managing bills and getting paid



Help Your Team Help You

- Write down how you do important tasks
- Train your team members properly
- Give them the tools they need to do their jobs
- Check their work to make sure it's done right



Make Your Customers Happy

- Create a proper way to welcome new customers
- Make sure they know how to use your product/service
- Help them get results quickly
- Keep in touch with them regularly

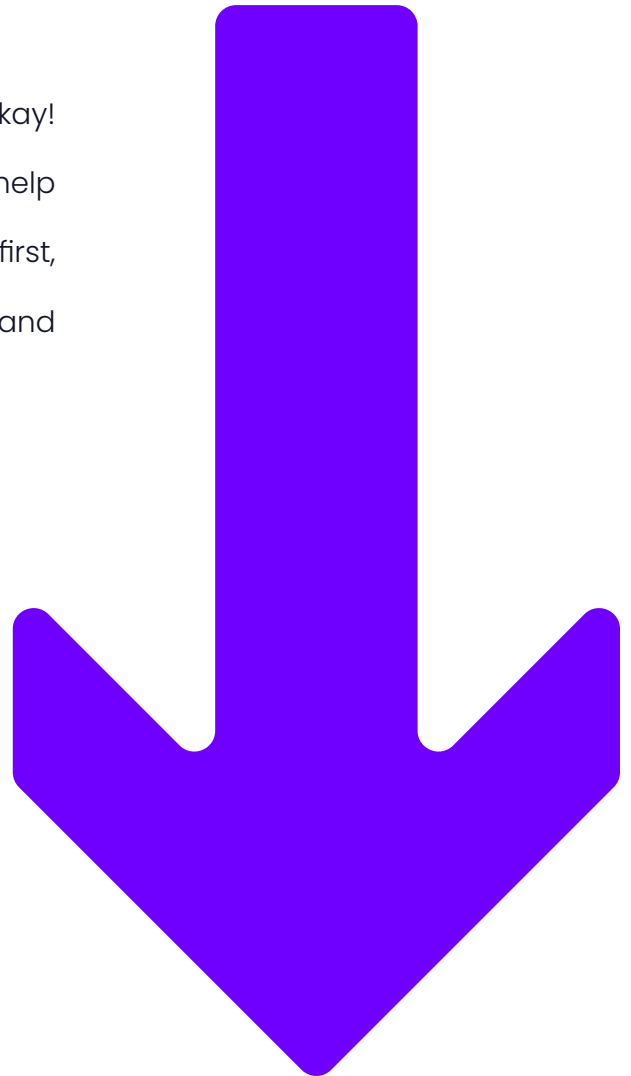
THE BOTTOM LINE

STAGE 3 IS ALL ABOUT GOING FROM CHAOS TO STABILITY.

You can't do everything yourself anymore, and that's okay! Your job is to build a small team and teach them how to help run the business. Focus on fixing the biggest problems first, setting up proper systems for money and employees, and making sure customers get good results.

If you can get through this stage, you'll have a real business with real employees, not just a one-person show. It's hard work, but about 7 million other businesses have done it.

YOU CAN TOO!



REMEMBER

Don't try to fix everything at once. Pick the biggest problem, fix it well, then move on to the next one. That's how you stabilize a growing business.

THIS IS WHAT'S COMING NEXT...



STAGE 5: PRODUCTIZE

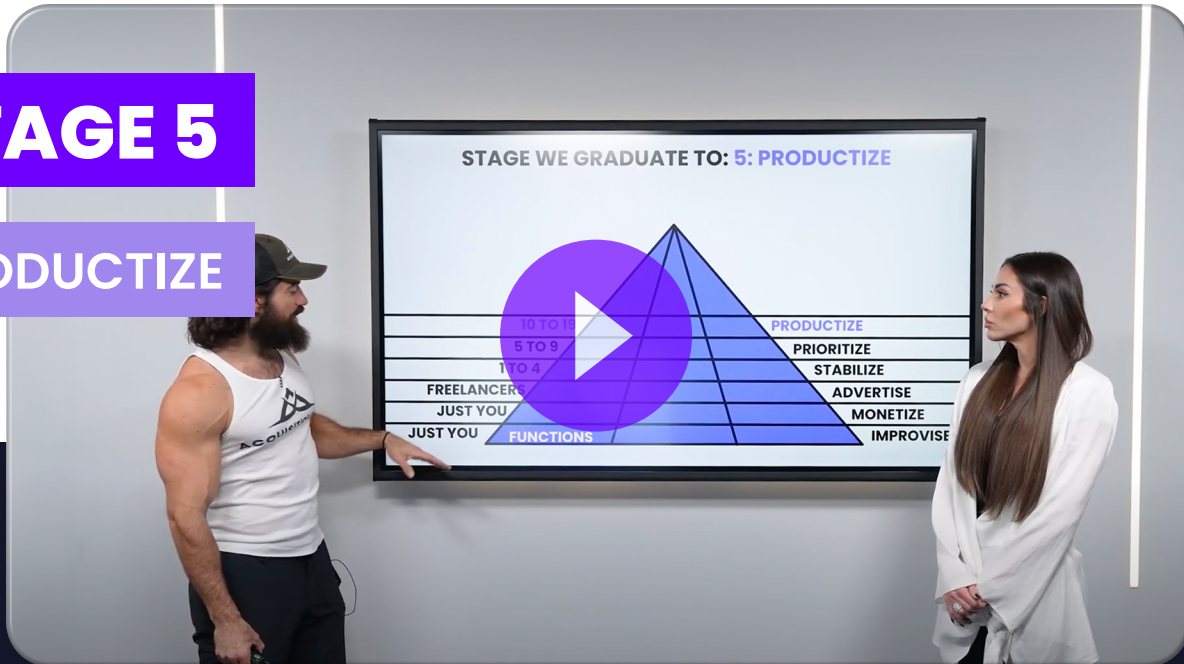
STAGE 5: PRODUCTIZE

HEADCOUNT	10 to 19	
YOUR ROLE	Director	
LEADERSHIP STRUCTURE	1.5 Layers: First 2–3 Managers	
# OF COMPANIES HERE	2,400,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Customers have nothing else to buy from you & churn.	Connect CS & product. Make something new to sell them.
MARKETING	Qualified leads are too expensive and cap your ability to advertise	Spend more on niche down messaging with new offer & raise CAC limit (spend more). Start scoring your leads (you select). Attr. + CRO.
SALES	Customers get sold with unrealistic expectations and refunds/bad reviews become an issue.	Create sales aids/materials. Install weekly game tape between CS & Sales/Marketing for QA & feedback. Track NPS/CSAT/Refund rate by rep.
CUSTOMER SERVICE	Customers come in with unrealistic expectations. Get inconsistent answers.	Build proper CS playbook to onboard & train team to answer Qs same way. WKLY Game tape review. Customer ascension path.
INFORMATION TECH (IT)	Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business.	Company provides company owned/controlled hardware and software. Need dashboard/reporting system.
RECRUITING	Have trouble finding higher level roles/managers.	Deliberate promotions from within rather than Peter Principle. Incentivize employee referrals = CAT = cost to acquire talent.
HUMAN RESOURCES (HR)	You're firing people incorrectly and exposed.	Create termination policies and process.
FINANCE	You don't know how much money you can reinvest into growth.	Make a budget (save for big expenses), simple financial forecasting, begin keeping track of tax write offs.
Bottom line	Not making enough per customer. Low LTV:CAC.	Make and sell your second premium product to customers.

YOUR STAGE

STAGE 5

PRODUCTIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 5**



YOUR ROLE

DIRECTOR



HEADCOUNT

10 to 19



BOTTOM LINE

Not making enough
per customer.
Low LTV:CAC.



GRADUATE BY

Make and sell your
second premium
product to customers

WHEN YOU HIT “STAGE 5: PRODUCTIZE”

You’ve grown to 10–19 employees! Around 2.4 million businesses reach this level. You’re now a “Director” with your first 2–3 managers under you. This is when your original product is doing well, but that’s not enough anymore. Your main challenge? You need a second product to keep growing. Specifically, you need to extend LTV – aka – you need to make more per customer. This gives you the cash to scale advertising and recruit even higher level people to your team to keep the growth coming.

THE BIG CHALLENGE: ONE PRODUCT ISN’T ENOUGH

The biggest problem at Stage 5 is that customers buy your product, but then they have nothing else to buy from you. They might even leave (churn) because they need other things you don’t offer. That’s why it’s called the “Productize” stage – you need to create new products to sell to your existing customers. Let’s look at what’s happening:

Products and Sales

Marketing and Customers

Tech and Data

People and HR

Money Matters





Products & Sales

- Customers have nothing else to buy from you after their first purchase
- You need to connect customer service with product development
- You need to make something new to sell to existing customers
- Sales people are overpromising and causing refunds and bad reviews
- You need to create sales materials and record customer calls for training



Marketing and Customers

- Getting qualified leads is getting expensive
- Your marketing needs to be more targeted
- Customer support is inconsistent – different people give different answers
- You need a proper playbook for customer service
- You need a plan for moving customers to higher-level products



Tech and Data

- Employees are using their personal computers and software
- When people leave, they take company information with them
- You need company-owned computers and software
- You need a way to track leads and customers
- You need dashboards to show important numbers



People and HR

- It's hard to find managers and higher-level employees
- You should promote good employees from within when possible
- You're firing people incorrectly and could get in trouble
- You need proper termination policies
- You need ways to encourage employee referrals



Money Matters

- You don't know how much money you can reinvest in growth
- You need a real budget
- You need simple financial forecasting
- You need to track tax write-offs better

WHAT SUCCESS LOOKS LIKE AT STAGE 5

Your job is to create a second premium product while making everything more professional. Here's what you need to do:



THE BOTTOM LINE

STAGE 5 IS ABOUT GOING FROM “ONE-HIT WONDER” TO HAVING MULTIPLE SUCCESSFUL PRODUCTS. YOU CAN’T GROW JUST BY SELLING MORE OF THE SAME THING. YOU NEED TO:



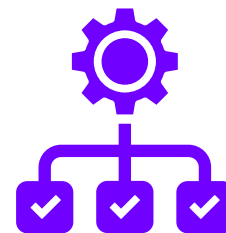
CREATE NEW PRODUCTS



SELL MORE TO EXISTING CUSTOMERS



MAKE EVERYTHING MORE PROFESSIONAL



SET UP PROPER SYSTEMS

This is when your business starts feeling like a real company that could keep growing for years. Instead of just doing one thing well, you’re building a business that can do several things well.

WHY IT’S CHALLENGING:

- Making a second product is hard
- You’re still fixing problems with the first product
- Everything needs to become more professional
- You need to spend money to grow

BUT IT’S WORTH IT BECAUSE:

- You can sell more to existing customers
- You reduce risk by having multiple products
- You build a stronger, more valuable company
- You create paths for future growth

REMEMBER

The key to Stage 5 is balance. You need to keep your first product running well while creating something new. You need to stay profitable while investing in growth. You need to keep current customers happy while attracting new ones.

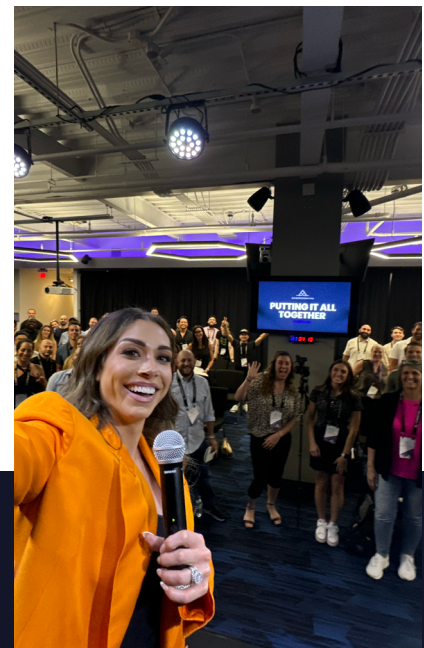
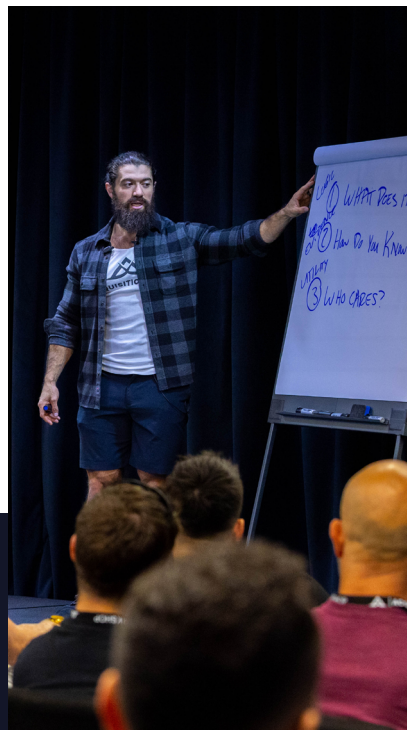
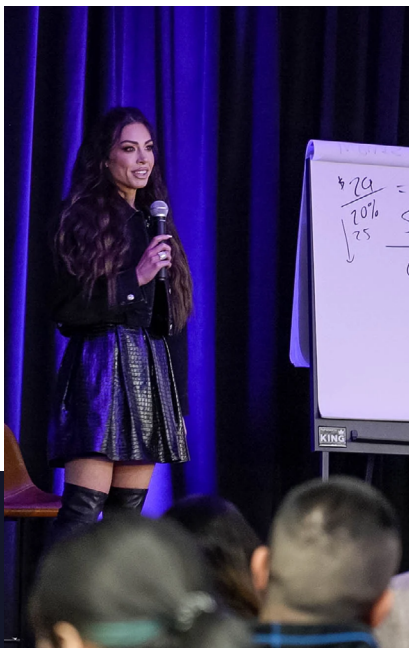
About 2.4 million businesses have figured out this balance. The ones that succeed usually:

- Start small with their second product
- Test it with their best customers

- Make sure it’s truly needed
- Price it well (usually higher than their first product)
- Keep the first product running smoothly while developing the new one

If you can master this balancing act, you’ll have a business that’s built to last and ready to grow even bigger.

DO YOU WANT TO SCALE TO THE NEXT STEP?



Trying to be everything to everyone? You need to niche down to serve only people like your best customers. A lot of businesses do lots of activity and they don't grow because they're solving the wrong problems – for the wrong person. If you want our help to select the right avatar, you can grab a seat at one of our next available workshops.



Check Dates

\$100M SCALING ROADMAP

► STAGE 5: PRODUCTIZE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 5: PRODUCTIZE



4: PRIORITIZE			5: PRODUCTIZE			6: OPTIMIZE		
HEADCOUNT	5 to 9		HEADCOUNT	10 to 19				
YOUR ROLE	Manager		YOUR ROLE	Director				
LEADERSHIP STRUCTURE	1 Layer: First Team		LEADERSHIP STRUCTURE	1.5 Layers: First 2-3 Managers				
# OF COMPANIES HERE	3,000,000		# OF COMPANIES HERE	2,400,000				
CONSTRAINT			CONSTRAINT			CONSTRAINT		
PRODUCT	You said yes to anyone who would pay. Feedback from so many different customers creates too many product directions.	Specialize. Make Add to Cart.	PRODUCT	Customers have nothing else to buy from you & churn.	Connect CS & product. Make something new to sell them.	CONSTRAINT	Too many unqualified leads.	Install incremental product improvement process for both products.
MARKETING	Too many unqualified leads.	Track how.	MARKETING	Qualified leads are too expensive and cap your ability to advertise.	Spend more on richer down messaging with new offer & raise CAC limit (spend more). Start scoring your leads (you select). Attr. + CRO.	TO GRADUATE	Speed to contact drops. You have no metrics around sales.	Implement Ad assembly process to increase volume.
SALES	Speed to contact drops. You have no metrics around sales.	Install it.	SALES	Customers get sold with unrealistic expectations and refunds/bad reviews become an issue.	Create sales aids/materials. Install weekly game tape between CS & Sales/Marketing for QA & feedback. Track NPS/CSAT/Refund rate by rep.		No metrics for customer success.	Install sales training system, individual coaching, and learn cadence.
CUSTOMER SERVICE	No metrics for customer success.	Get even.	CUSTOMER SERVICE	Customers come in with unrealistic expectations. Get inconsistent answers.	Build proper CS playbook to onboard & train team to answer Qs same way. Wkly Game tape review. Customer ascension path.		New team isn't using everything.	Create customer segmentation by cohort and activation points.
INFORMATION TECH (IT)	New team isn't using everything.	Learn how.	INFORMATION TECH (IT)	Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business.	Company provides company owned/controlled hardware and software. Head dashboard/reporting system.		Wasting time with bad candidates.	Cyber security. Malware. Password protection from and for employees. Onboarding and offboarding employees.
RECRUITING	Wasting time with bad candidates.	Get profile.	RECRUITING	Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business.	Deliberate promotions from within rather than Peter Principle. Incentivize employee referrals + GAT + cost to acquire talent.		Employees don't know how to behave (Pro, sick days, dress code, ends of contract).	You learn to headhunt higher level roles. Add multiple interviewers filtering for different skills.
HUMAN RESOURCES (HR)	Employees don't know how to behave (Pro, sick days, dress code, ends of contract).	Niche do.	HUMAN RESOURCES (HR)	Have trouble finding higher level roles/managers.			Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.	Setup benefits, retirement, and advanced compensation plans.
FINANCE	Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.		FINANCE	You're firing people incorrectly and exposed.	Create termination policies and process.		Trying to be everything to everyone.	Scale up all/UP. Get more granular financial data. Balance sheet. Begin making quarterly tax payments.
Bottom line	Trying to be everything to everyone.		Bottom line	You don't know how much money you can reinvest into growth.	Make a budget (save for big expenses), simple financial forecasting, begin keeping track of tax write offs.			Grow by doing everything better, rather than more.
			Bottom line					
			Not making enough per customer. Low LTV/CAC.					
			Make and sell your second premium product to customers.					

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 5: PRODUCTIZE

HEADCOUNT	10 to 19	
YOUR ROLE	Director	
LEADERSHIP STRUCTURE	1.5 Layers: First 2–3 Managers	
# OF COMPANIES HERE	2,400,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Customers have nothing else to buy from you & churn.	Connect CS & product. Make something new to sell them.
MARKETING	Qualified leads are too expensive and cap your ability to advertise	Spend more on niche down messaging with new offer & raise CAC limit (spend more). Start scoring your leads (you select). Attr. + CRO.
SALES	Customers get sold with unrealistic expectations and refunds/bad reviews become an issue.	Create sales aids/materials. Install weekly game tape between CS & Sales/Marketing for QA & feedback. Track NPS/CSAT/Refund rate by rep.
CUSTOMER SERVICE	Customers come in with unrealistic expectations. Get inconsistent answers.	Build proper CS playbook to onboard & train team to answer Qs same way. WKLY Game tape review. Customer ascension path.
INFORMATION TECH (IT)	Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business.	Company provides company owned/controlled hardware and software. Need dashboard/reporting system.
RECRUITING	Have trouble finding higher level roles/managers.	Deliberate promotions from within rather than Peter Principle. Incentivize employee referrals = CAT = cost to acquire talent.
HUMAN RESOURCES (HR)	You're firing people incorrectly and exposed.	Create termination policies and process.
FINANCE	You don't know how much money you can reinvest into growth.	Make a budget (save for big expenses), simple financial forecasting, begin keeping track of tax write offs.
Bottom line	Not making enough per customer. Low LTV:CAC.	Make and sell your second premium product to customers.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



Repeat themes to be aware of



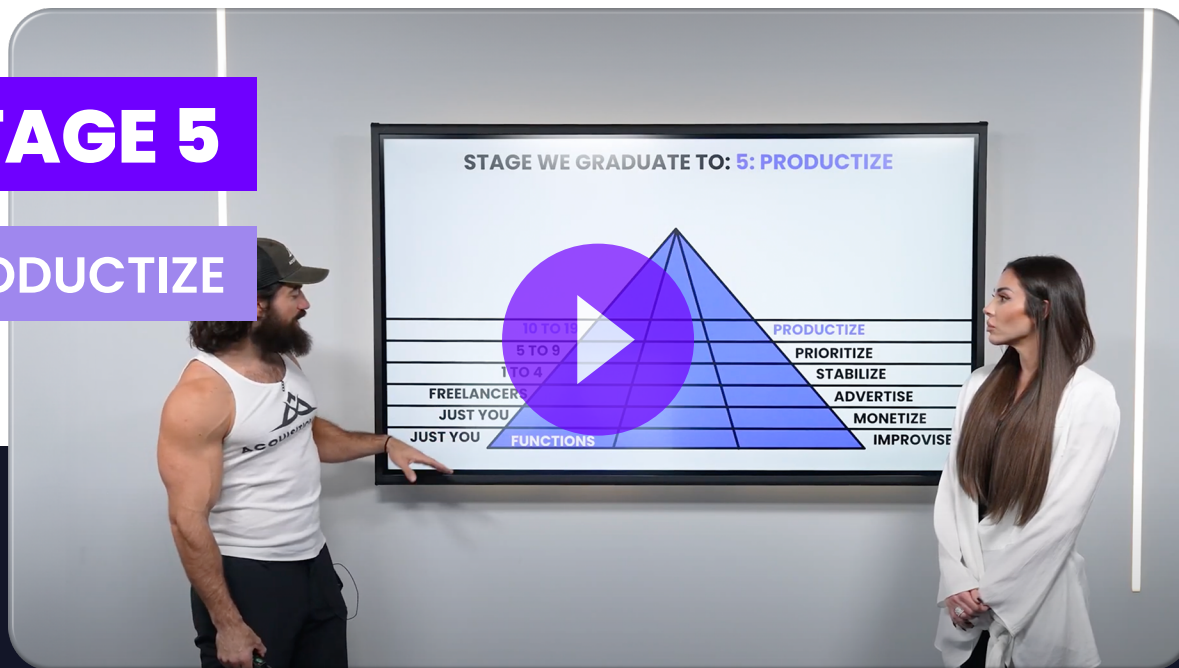
How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE

STAGE 5

PRODUCTIZE



**THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 5****



YOUR ROLE

DIRECTOR



HEADCOUNT

10 to 19



BOTTOM LINE

Not making enough
per customer.
Low LTV:CAC.



GRADUATE BY

Make and sell your
second premium
product to customers

WHEN YOU HIT “STAGE 5: PRODUCTIZE”

You’ve grown to 10–19 employees! Around 2.4 million businesses reach this level. You’re now a “Director” with your first 2–3 managers under you. This is when your original product is doing well, but that’s not enough anymore. Your main challenge? You need a second product to keep growing. Specifically, you need to extend LTV – aka – you need to make more per customer. This gives you the cash to scale advertising and recruit even higher level people to your team to keep the growth coming.

THE BIG CHALLENGE: ONE PRODUCT ISN’T ENOUGH

The biggest problem at Stage 5 is that customers buy your product, but then they have nothing else to buy from you. They might even leave (churn) because they need other things you don’t offer. That’s why it’s called the “Productize” stage – you need to create new products to sell to your existing customers. Let’s look at what’s happening:

Products and Sales

Marketing and Customers

Tech and Data

People and HR

Money Matters





Products & Sales

- Customers have nothing else to buy from you after their first purchase
- You need to connect customer service with product development
- You need to make something new to sell to existing customers
- Sales people are overpromising and causing refunds and bad reviews
- You need to create sales materials and record customer calls for training



Marketing and Customers

- Getting qualified leads is getting expensive
- Your marketing needs to be more targeted
- Customer support is inconsistent – different people give different answers
- You need a proper playbook for customer service
- You need a plan for moving customers to higher-level products



Tech and Data

- Employees are using their personal computers and software
- When people leave, they take company information with them
- You need company-owned computers and software
- You need a way to track leads and customers
- You need dashboards to show important numbers



People and HR

- It's hard to find managers and higher-level employees
- You should promote good employees from within when possible
- You're firing people incorrectly and could get in trouble
- You need proper termination policies
- You need ways to encourage employee referrals

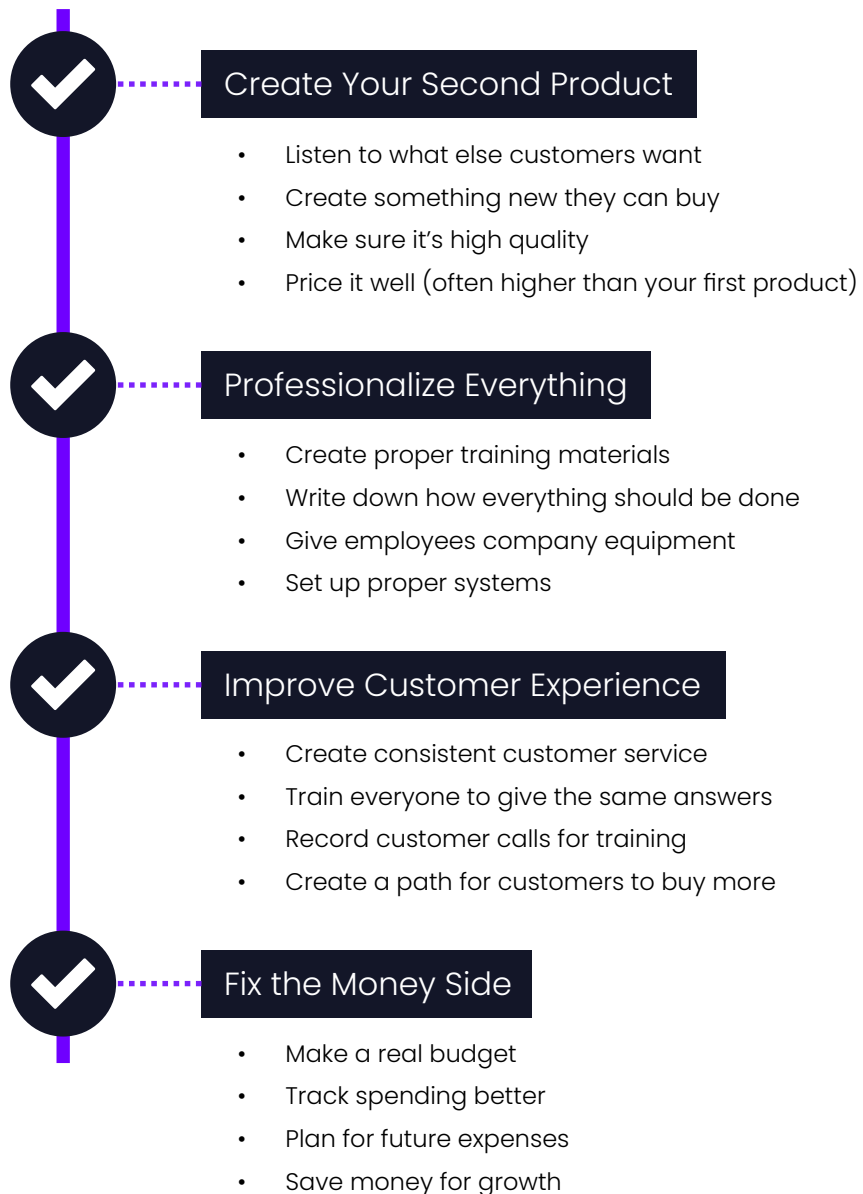
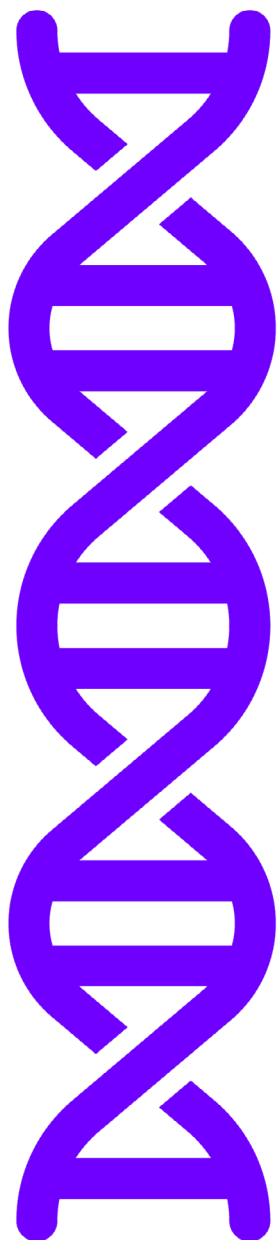


Money Matters

- You don't know how much money you can reinvest in growth
- You need a real budget
- You need simple financial forecasting
- You need to track tax write-offs better

WHAT SUCCESS LOOKS LIKE AT STAGE 5

Your job is to create a second premium product while making everything more professional. Here's what you need to do:



THE BOTTOM LINE

STAGE 5 IS ABOUT GOING FROM “ONE-HIT WONDER” TO HAVING MULTIPLE SUCCESSFUL PRODUCTS. YOU CAN’T GROW JUST BY SELLING MORE OF THE SAME THING. YOU NEED TO:



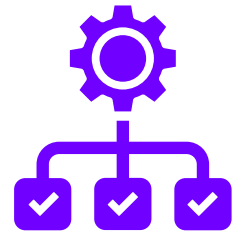
CREATE NEW PRODUCTS



SELL MORE TO EXISTING CUSTOMERS



MAKE EVERYTHING MORE PROFESSIONAL



SET UP PROPER SYSTEMS

This is when your business starts feeling like a real company that could keep growing for years. Instead of just doing one thing well, you’re building a business that can do several things well.

WHY IT’S CHALLENGING:

- Making a second product is hard
- You’re still fixing problems with the first product
- Everything needs to become more professional
- You need to spend money to grow

BUT IT’S WORTH IT BECAUSE:

- You can sell more to existing customers
- You reduce risk by having multiple products
- You build a stronger, more valuable company
- You create paths for future growth

REMEMBER

The key to Stage 5 is balance. You need to keep your first product running well while creating something new. You need to stay profitable while investing in growth. You need to keep current customers happy while attracting new ones.

About 2.4 million businesses have figured out this balance. The ones that succeed usually:

- Start small with their second product
- Test it with their best customers

- Make sure it’s truly needed
- Price it well (usually higher than their first product)
- Keep the first product running smoothly while developing the new one

If you can master this balancing act, you’ll have a business that’s built to last and ready to grow even bigger.

DO YOU WANT TO **SCALE** TO THE NEXT STEP?



What they see: you've got a successful business. What you see: you don't take home much at the end of the month. Reason: You're not making enough profit. If you want to expand your margin, have more cash to grow, and make more money, you can see how we do this at a Scaling Workshop.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...



STAGE 4: PRIORITIZE

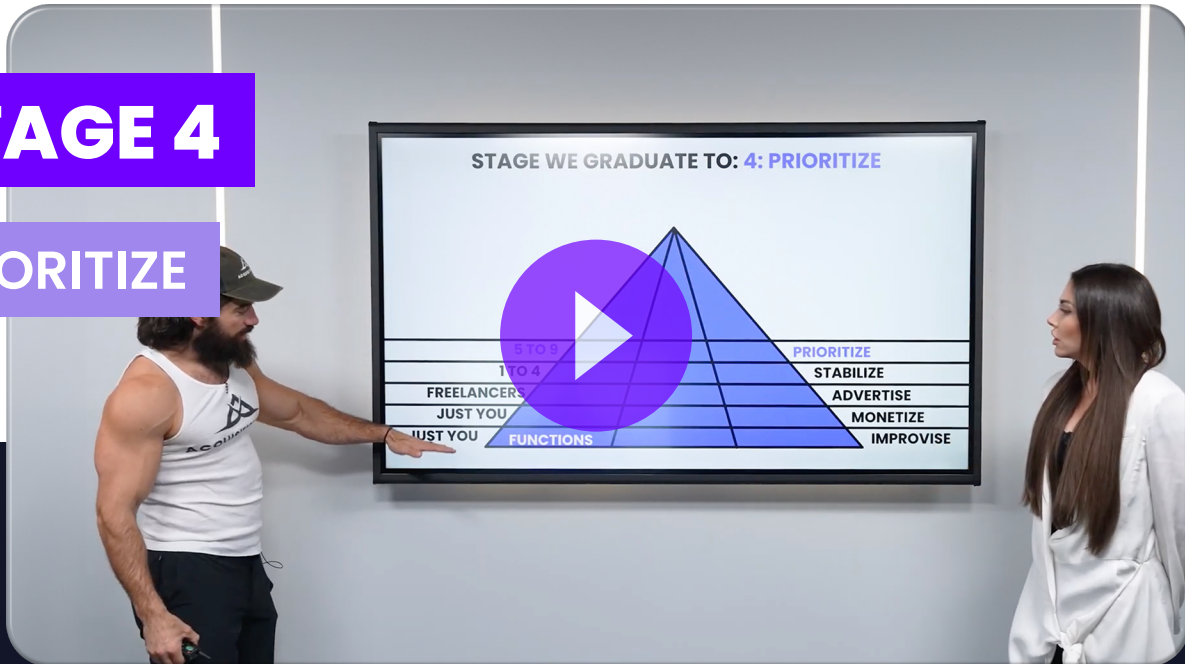
STAGE 4: PRIORITIZE

HEADCOUNT	5 to 9	
YOUR ROLE	Manager	
LEADERSHIP STRUCTURE	1 Layer: First Team	
# OF COMPANIES HERE	3,000,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	You said yes to anyone who would pay. Feedback from so many different customers creates too many product directions.	Specialize product (v2) & price to serve niched down avatar.
MARKETING	Too many unqualified leads	Make better free stuff & more creative to boost volume. Add qualification/friction so the extra volume self-selects.
SALES	Speed to contact drops. You have no metrics around sales.	Track basic KPIs manually on spreadsheet (contact rate, sched, show, offer, close, cash collected).
CUSTOMER SERVICE	No metrics for customer success.	Install tracking & KPIs. Record and centralize notes for each customer in a CRM.
INFORMATION TECH (IT)	New team isn't using everything.	Get everyone on platforms. Protect passwords. Get project management tool & comms (work chat tool).
RECRUITING	Wasting time with bad candidates.	Learn how to conduct a proper interview and check references.
HUMAN RESOURCES (HR)	Employees don't know how to behave (PTO, sick days, dress code, code of conduct).	Employee handbook & policies.
FINANCE	Cash flow is lumpy due to random "one-time" expenses. You find out that businesses cost money to run.	Get profit and loss statements and cash flow statements setup. Get basic business insurance.
Bottom line	Trying to be everything to everyone.	Niche down to serve only people like your best customers.

YOUR STAGE

STAGE 4

PRIORITIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 4**



YOUR ROLE

MANAGER



HEADCOUNT

5 to 9



BOTTOM LINE

Trying to be
everything to
everyone



GRADUATE BY

Niche down to
serve only people
like your best
customers

WHEN YOU HIT “STAGE 4: PRIORITIZE”

Welcome to having 5–9 employees! About 3 million businesses reach this level. This is when you change from being a “trainer” to becoming a real “manager.” You’ll have your first real team, with one layer of organization between you and the front-line workers. The big difference? You can’t do everything anymore – you have to choose what matters most.

THE BIG CHALLENGE: TRYING TO PLEASE EVERYONE

The main problem at Stage 4 is that you’ve been saying “yes” to any customer who would pay you. Now that’s causing problems because different customers want different things. That’s why it’s called the “Prioritize” stage – you need to figure out who your best customers are and focus on them. Let’s break down what’s happening:

Products and Customers

Marketing and Sales

Customer Service

Tech and Tools

People and HR

Money Matters





Products & Customers

- You've said yes to anyone who would pay, and now your product is pulled in too many directions
- You need to choose a specific type of customer to focus on
- You need to update your product to serve just those ideal customers
- You might need to raise your prices to match your specialized service



Marketing & Sales

- You're getting too many unqualified leads (people who aren't right for your business)
- You need to create better free content to attract the right people
- Your sales team isn't following up with leads quickly enough
- You need to start tracking basic sales numbers like how many calls you make and how many people buy



Customer Service

- You have no way to measure if customers are happy
- You need to start tracking customer satisfaction
- Customer information is scattered everywhere
- You need a proper system (CRM) to keep track of customer notes and interactions



Tech and Tools

- Your new team isn't using all the tools properly
- You need to get everyone on the same platforms
- You need to protect passwords and data
- You need project management and team chat tools



People and HR

- You're wasting time interviewing people who aren't right for the job
- You need to learn how to interview properly and check references
- Employees don't know basic rules about time off, dress code, etc.
- You need to create an employee handbook with basic policies

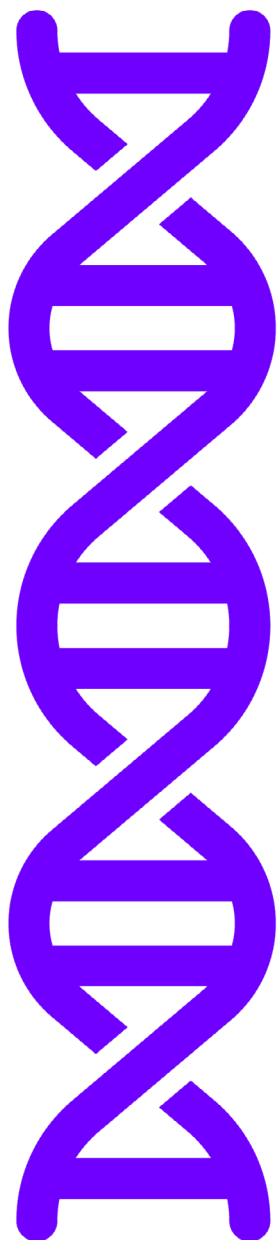


Money Matters

- You keep getting surprised by "one-time" expenses
- You're learning that running a business costs more than you thought
- You need proper profit and loss statements
- You need basic business insurance

WHAT SUCCESS LOOKS LIKE AT STAGE 4

Your job is to make the business more focused and professional. Here's what you need to do to graduate from Stage 4:



Choose Your Focus

- Figure out who your best customers are
- Change your product to serve them better
- Stop trying to please everyone
- Be willing to say "no" to customers who aren't a good fit



Get Organized

- Set up proper systems for tracking sales
- Keep all customer information in one place
- Make sure everyone uses the same tools
- Create basic rules and policies



Start Measuring Things

- Track how many leads turn into sales
- Measure customer satisfaction
- Monitor how quickly you respond to leads
- Keep track of basic financial numbers



Make Things Professional

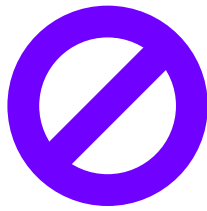
- Write an employee handbook
- Set up proper insurance
- Create basic processes for everything
- Start running your business like a real company

THE BOTTOM LINE

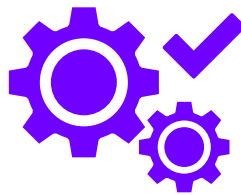
STAGE 4 IS ALL ABOUT FOCUS AND PRIORITIES. YOU CAN'T SERVE EVERYONE, AND YOU CAN'T DO EVERYTHING. YOU NEED TO CHOOSE WHAT'S MOST IMPORTANT AND FOCUS ON THAT. THIS MEANS:



**PICKING
YOUR IDEAL
CUSTOMERS**



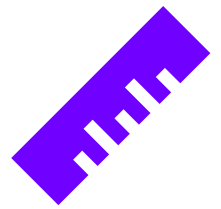
**SAYING
NO TO
OTHERS**



**SETTING
UP BASIC
SYSTEMS**



**CREATING
CLEAR
RULES**



**MEASURING
WHAT
MATTERS**

This is when your business starts feeling like a real company instead of just a group of people working together. It's when you stop trying to please everyone and start focusing on being really good at serving specific types of customers.

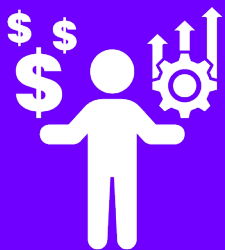
REMEMBER

The key to Stage 4 is learning to say "no." No to customers who aren't right for you. No to projects that don't fit. No to doing everything yourself. That's how you build a focused, successful business that can grow even bigger.

It's a hard transition because saying "no" means turning down money in the short term. But it's necessary if you

want to build something bigger in the long term. About 3 million businesses have made this transition successfully. If you stay focused on serving your best customers really well, you will too.

THIS IS WHAT'S COMING NEXT...



STAGE 6: OPTIMIZE

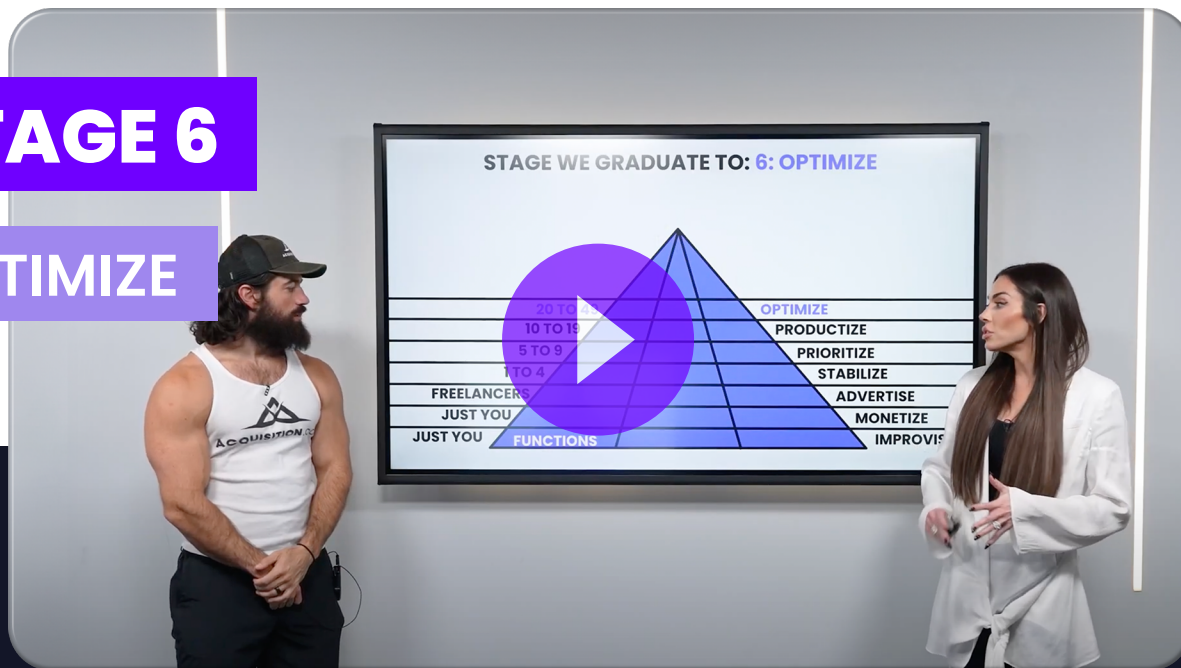
STAGE 6: OPTIMIZE

HEADCOUNT	20 to 49	
YOUR ROLE	Leader	
LEADERSHIP STRUCTURE	2 Layers: Full Team of Managers	
# OF COMPANIES HERE	2,100,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Improving two products slows down improvements.	Install incremental product improvement process for both products.
MARKETING	Ads don't convert as well to colder traffic. CAC goes up.	Implement Ad assembly process to increase volume.
SALES	Closing efficiency on core product drops. Becomes inconsistent. Refunds go down but so do closes.	Install sales training system, individual coaching, and team cadence.
CUSTOMER SERVICE	Churn increases due to volume & new product.	Create customer segmentation by cohort and activation points.
INFORMATION TECH (IT)	New people coming in. Old people leaving with IP, data, and access.	Cyber security. Malware. Password protection from and for employees. Onboarding and offboarding employees.
RECRUITING	The number and type of roles you need exceed your current network. (Everyone who's good has a job already.)	You learn to headhunt higher level roles. Add multiple interviews filtering for different skills.
HUMAN RESOURCES (HR)	You can't get higher level talent because they expect full compensation package (benefits, retirement, etc)	Setup benefits, retirement, and advanced compensation plans
FINANCE	You're spending money to grow, but you're not. Money is missing. Where's my return?	Scale up AR/AP. Get more granular financial data. Balance sheet. Begin making quarterly tax payments.
Bottom line	Everything is inefficient.	Grow by doing everything better rather than more.

YOUR STAGE

STAGE 6

OPTIMIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 6**



YOUR ROLE

Leader



HEADCOUNT

20-49



BOTTOM LINE

Everything is
inefficient



GRADUATE BY

Doing better rather
than doing more

WHEN YOU HIT “STAGE 6: OPTIMIZE”

You’ve grown to 20–49 employees! About 2.1 million businesses reach this level. You’re now a “Leader” with a full team of managers under you. The interesting thing about this stage? Your main challenge isn’t doing more—it’s doing everything better. You have two products, but they both need improvement.

THE BIG CHALLENGE: EVERYTHING COULD BE BETTER

The biggest problem at Stage 6 is that having more people doesn’t automatically make things work better. Things are actually getting less efficient. That’s why it’s called the “Optimize” stage—you need to make everything work better, not just bigger. Let’s look at what’s happening...

Products and Marketing

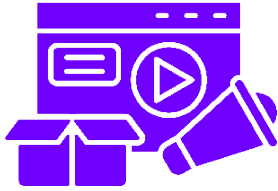
Sales and Customer Service

Tech and Security

People and HR

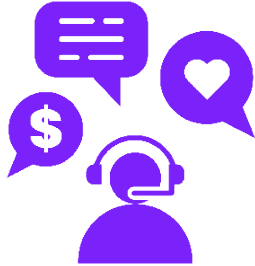
Money Matters





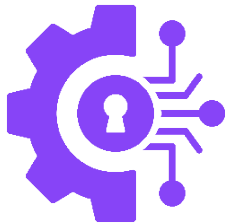
Products and Marketing

- Improving two products at once is slowing everything down
- You need a process to improve both products bit by bit
- Your ads don't work as well with colder audiences
- Your marketing costs (CAC) are going up
- You need a better way to create ads at scale



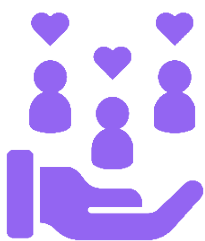
Sales and Customer Service

- Your core product isn't closing as well as it used to
- Sales team needs real training now
- Customer churn is increasing because you have more products
- You need to group customers by when they joined and how they use products
- You need to track more detailed customer success metrics



Tech and Security

- New people are joining, others are leaving
- Company data and access is at risk
- You need real cybersecurity
- You need better password protection
- You need proper employee onboarding and offboarding for tech



People and HR

- You can't find enough good people through your network
- Everyone who's good already has a job
- You need multiple interviews for different skills
- High-level talent wants full benefits packages
- You need retirement plans and better benefits

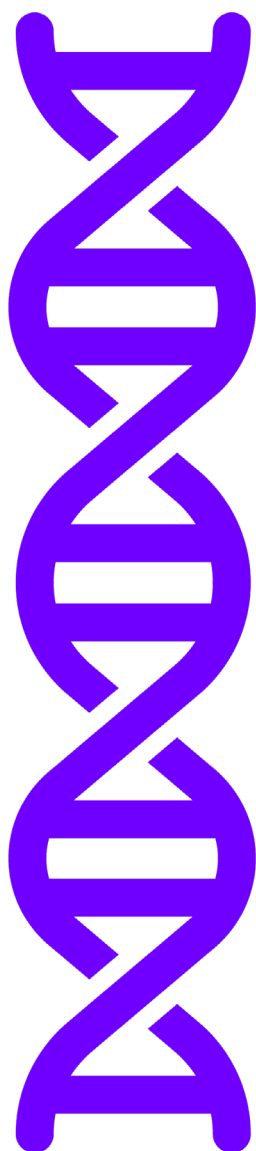


Money Matters

- You're spending money on growth but not growing
- Money seems to be missing or wasted
- You need more detailed financial data
- You need a real balance sheet
- You need to pay taxes quarterly

WHAT SUCCESS LOOKS LIKE AT STAGE 6

YOUR JOB IS TO MAKE EVERYTHING WORK BETTER. HERE'S WHAT YOU NEED TO DO:



Fix The Basics

- Make your core systems work better
- Train your people better
- Track everything important
- Fix the biggest inefficiencies first



Protect Your Business

- Set up proper security
- Protect company data
- Get proper insurance
- Create proper processes



Make Things Measurable

- Track important numbers
- Measure employee performance
- Monitor customer satisfaction
- Watch financial metrics



Build For The Future

- Create training systems
- Set up better benefits
- Improve your technology
- Make things scalable

THE BOTTOM LINE

STAGE 6 IS ABOUT MAKING EVERYTHING WORK BETTER, NOT JUST BIGGER. INSTEAD OF JUST ADDING MORE PEOPLE OR DOING MORE THINGS, YOU NEED TO:



**IMPROVE
EXISTING SYSTEMS**



**MAKE THINGS
MORE EFFICIENT**



**FIX WHAT'S
BROKEN**



**BUILD BETTER
PROCESSES**

WHY IT'S CHALLENGING:

- It's tempting to just do more instead of better
- Fixing things takes time and money
- You have to change how things work
- People resist change
- You have to invest in improvement without immediate payoff

BUT IT'S WORTH IT BECAUSE:

- Things start working smoothly
- You waste less money
- People are more productive
- You can grow without breaking things

REMEMBER

The key to Stage 6 is patience. Making things better takes time. You can't rush optimization. You have to:

- Find what's not working well
- Figure out why
- Create a better way
- Test it
- Train people
- Monitor results

About 2.1 million businesses have mastered this optimization phase. The successful ones usually:

- Focus on one improvement at a time
- Measure results carefully
- Train people properly
- Create good systems
- Document everything
- Make sure changes stick

THE SECRET TO SUCCESS

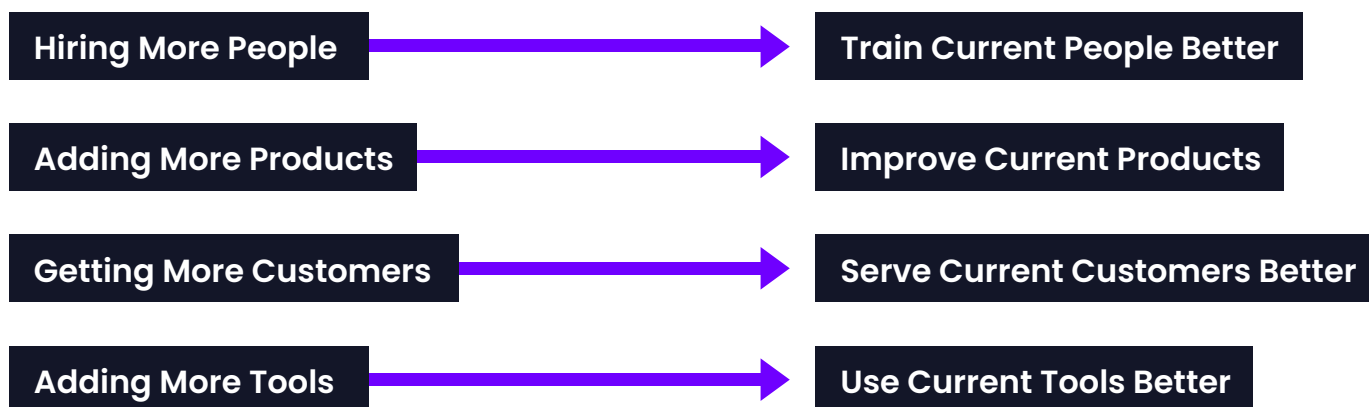
THE REAL SECRET TO STAGE 6 IS REALIZING THAT “BETTER” BEATS “MORE.”



DON'T DO THIS



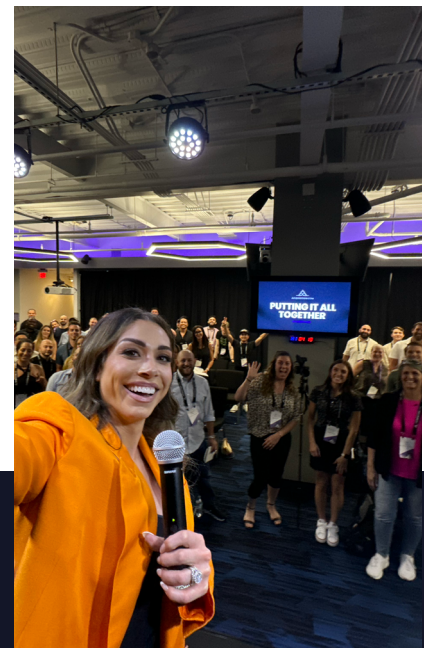
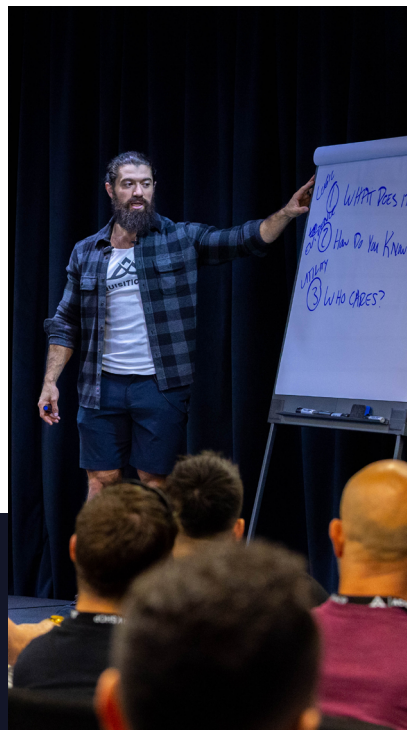
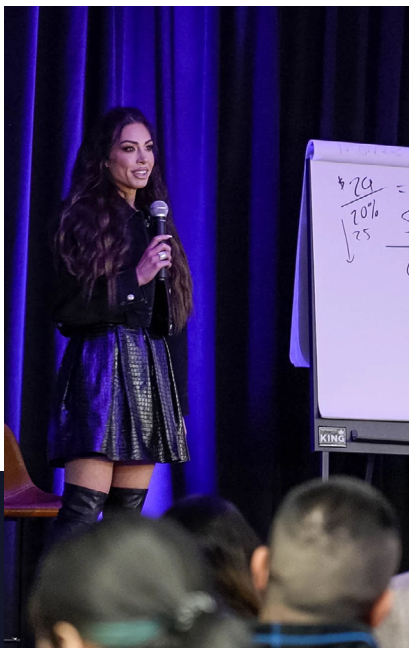
DO THIS INSTEAD



If you can make this shift from “more” to “better,” you’ll build a stronger business that’s ready for even bigger growth.

Remember, at this stage, success isn’t about doing more—it’s about getting more for what you do.

DO YOU WANT TO SCALE TO THE NEXT STEP?

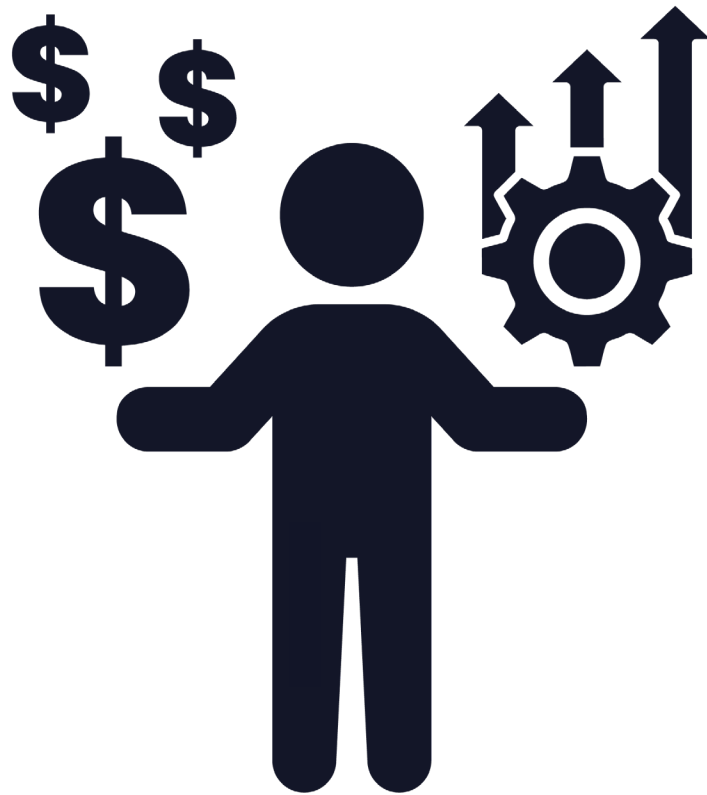


What they see: you've got a successful business. What you see: you don't take home much at the end of the month. Reason: You're not making enough profit. If you want to expand your margin, have more cash to grow, and make more money, you can see how we do this at a Scaling Workshop.

 Check Dates

\$100M SCALING ROADMAP

► STAGE 6: OPTIMIZE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 6: OPTIMIZE



5: PRODUCTIZE			6: OPTIMIZE			7: CATEGORIZE		
HEADCOUNT	10 to 19		20 to 49					
YOUR ROLE	Director		Leader					
LEADERSHIP STRUCTURE	15 Layers: First 2-3 Managers		2 Layers: Full Team of Managers					
# OF COMPANIES HERE	2,400,000		2,100,000					
CONSTRAINT			TO GRADUATE			CONSTRAINT		
PRODUCT	Customers have nothing else to buy from you & churn.	Can't spend more	Improving two products slows down improvements.	Install incremental product improvement process for both products.		Improvements take too long to roll out.	Fix one problem at a time with focused feature specific teams.	
MARKETING	Qualified leads are too expensive and stop your ability to advertise	Can't scale	Ads don't convert as well to colder traffic. CAC goes up.	Implement Ad assembly process to increase volume.		You only have access to get customers.	Fund 2nd acq channel with referral process (& track it) & segmented LT nurture by lead score. Pick most similar platform--not new core 4.	
SALES	Customers get sold with unrealistic expectations and refund/hold reviews become an issue	Can't scale	Closing efficiency on core product drops. Becomes inconsistent. Refunds go down but so do closes.	Install sales training system, individual coaching, and team cadence.		It just not worked consistently	Better schedule coverage. Create lead nurture checklist & routes for top show rates.	
CUSTOMER SERVICE	Customers come in with unrealistic expectations, get inconsistent answers	Can't scale	Churn increases due to volume & new product	Create customer segmentation by cohort and activation points.		Service. All but fighting	Create proactive customer journey & communication. Focus on renewals and upsells.	
INFORMATION TECH (IT)	Employees using their personal hardware and software and causes issues when people leave. No tracking for work and customer interacting with your business.	Can't scale	New people coming in. Old people leaving with IP, data, and access.	Cyber security. Malware. Password protection from and for employees. Onboarding and offboarding employees.		Use the place and disorganized people and they get fired elsewhere. You may look at consultants and where they're in the process.	Network technology. Bring solutions to the cloud. Data host. Centrally locate hardware if onsite.	
RECRUITING	Have trouble finding higher level roles/management.	Can't scale	The number and type of roles you need exceed your current network. (Everyone who's good has a job already.)	You learn to headhunt higher level roles. Add multiple interviews filtering for different skills.		Install Applicant Tracking System to keep track of so many open roles. They specialized recruiting firms to keep up.	Setup HRIS - Human Resource Information System	
HUMAN RESOURCES (HR)	You're firing people incorrectly and exposed	Can't scale	You can't get higher level talent because they expect full compensation package (benefits, retirement, etc)	Setup benefits, retirement, and advanced compensation plans		HRIS for employee information and you have to do it	Offer expense management. Budgets by dept. Cards w limits. Expense approval process. Add insurance coverage & get fancier projections.	
FINANCE	You don't know how much money you can reinvest into growth	Can't scale	You're spending money to grow, but you're not. Money is missing. Where's my return?	Scale up AR/AP. Get more granular financial data. Balance sheet. Begin making quarterly tax payments.		Watch your money closely.	Trimmed. The business is disorganized.	
Bottom line	Not making enough per customer. Low LTV/CAC.	Can't scale	Everything is inefficient.	Grow by doing everything better rather than more.			Triage appropriately.	

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 6: OPTIMIZE

HEADCOUNT	20 to 49	
YOUR ROLE	Leader	
LEADERSHIP STRUCTURE	2 Layers: Full Team of Managers	
# OF COMPANIES HERE	2,100,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Improving two products slows down improvements.	Install incremental product improvement process for both products.
MARKETING	Ads don't convert as well to colder traffic. CAC goes up.	Implement Ad assembly process to increase volume.
SALES	Closing efficiency on core product drops. Becomes inconsistent. Refunds go down but so do closes.	Install sales training system, individual coaching, and team cadence.
CUSTOMER SERVICE	Churn increases due to volume & new product.	Create customer segmentation by cohort and activation points.
INFORMATION TECH (IT)	New people coming in. Old people leaving with IP, data, and access.	Cyber security. Malware. Password protection from and for employees. Onboarding and offboarding employees.
RECRUITING	The number and type of roles you need exceed your current network. (Everyone who's good has a job already.)	You learn to headhunt higher level roles. Add multiple interviews filtering for different skills.
HUMAN RESOURCES (HR)	You can't get higher level talent because they expect full compensation package (benefits, retirement, etc)	Setup benefits, retirement, and advanced compensation plans
FINANCE	You're spending money to grow, but you're not. Money is missing. Where's my return?	Scale up AR/AP. Get more granular financial data. Balance sheet. Begin making quarterly tax payments.
Bottom line	Everything is inefficient.	Grow by doing everything better rather than more.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE
\$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences
between stages



Repeat themes
to be aware of



How to get the most
out of your business

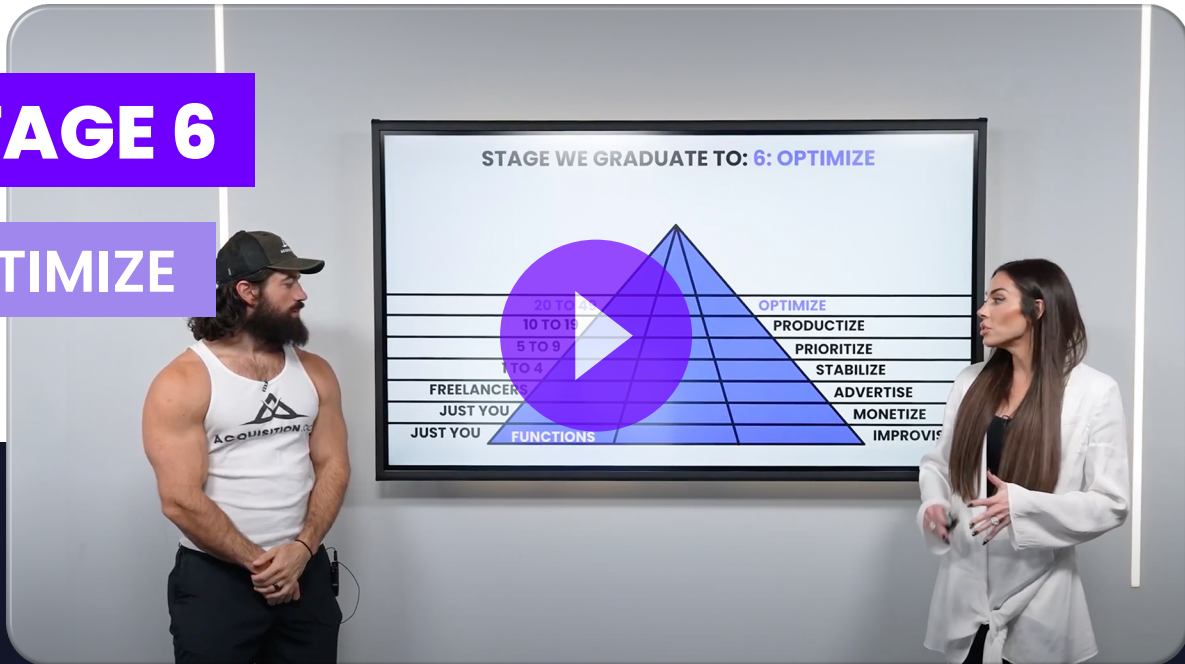


GOT IT? LET'S
START SCALING

YOUR STAGE

STAGE 6

OPTIMIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 6**



YOUR ROLE

Leader



HEADCOUNT

20-49



BOTTOM LINE

Everything is
inefficient



GRADUATE BY

Doing better rather
than doing more

WHEN YOU HIT “STAGE 6: OPTIMIZE”

You’ve grown to 20–49 employees! About 2.1 million businesses reach this level. You’re now a “Leader” with a full team of managers under you. The interesting thing about this stage? Your main challenge isn’t doing more—it’s doing everything better. You have two products, but they both need improvement.

THE BIG CHALLENGE: EVERYTHING COULD BE BETTER

The biggest problem at Stage 6 is that having more people doesn’t automatically make things work better. Things are actually getting less efficient. That’s why it’s called the “Optimize” stage—you need to make everything work better, not just bigger. Let’s look at what’s happening...

Products and Marketing

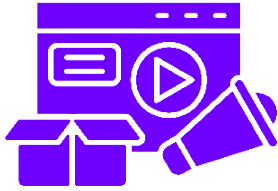
Sales and Customer Service

Tech and Security

People and HR

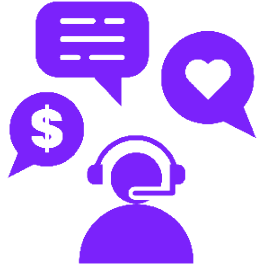
Money Matters





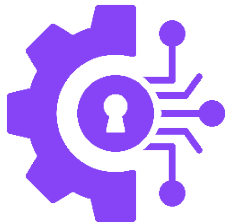
Products and Marketing

- Improving two products at once is slowing everything down
- You need a process to improve both products bit by bit
- Your ads don't work as well with colder audiences
- Your marketing costs (CAC) are going up
- You need a better way to create ads at scale



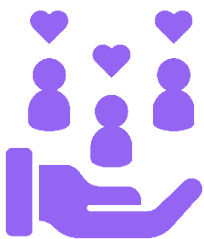
Sales and Customer Service

- Your core product isn't closing as well as it used to
- Sales team needs real training now
- Customer churn is increasing because you have more products
- You need to group customers by when they joined and how they use products
- You need to track more detailed customer success metrics



Tech and Security

- New people are joining, others are leaving
- Company data and access is at risk
- You need real cybersecurity
- You need better password protection
- You need proper employee onboarding and offboarding for tech



People and HR

- You can't find enough good people through your network
- Everyone who's good already has a job
- You need multiple interviews for different skills
- High-level talent wants full benefits packages
- You need retirement plans and better benefits

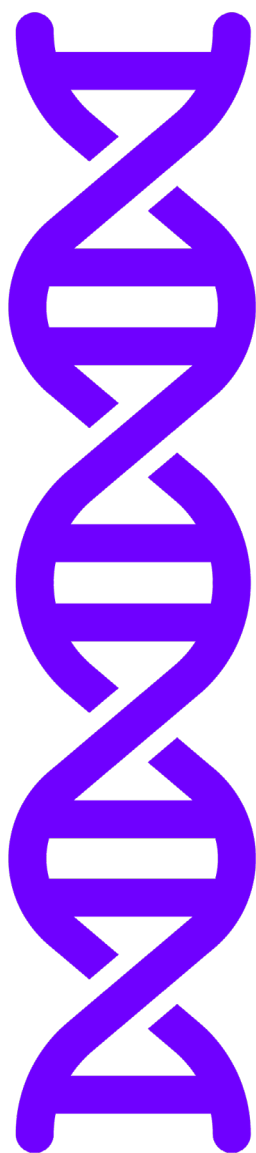


Money Matters

- You're spending money on growth but not growing
- Money seems to be missing or wasted
- You need more detailed financial data
- You need a real balance sheet
- You need to pay taxes quarterly

WHAT SUCCESS LOOKS LIKE AT STAGE 6

YOUR JOB IS TO MAKE EVERYTHING WORK BETTER.
HERE'S WHAT YOU NEED TO DO:



Fix The Basics

- Make your core systems work better
- Train your people better
- Track everything important
- Fix the biggest inefficiencies first



Protect Your Business

- Set up proper security
- Protect company data
- Get proper insurance
- Create proper processes



Make Things Measurable

- Track important numbers
- Measure employee performance
- Monitor customer satisfaction
- Watch financial metrics



Build For The Future

- Create training systems
- Set up better benefits
- Improve your technology
- Make things scalable

THE BOTTOM LINE

STAGE 6 IS ABOUT MAKING EVERYTHING WORK BETTER, NOT JUST BIGGER. INSTEAD OF JUST ADDING MORE PEOPLE OR DOING MORE THINGS, YOU NEED TO:



**IMPROVE
EXISTING SYSTEMS**



**MAKE THINGS
MORE EFFICIENT**



**FIX WHAT'S
BROKEN**



**BUILD BETTER
PROCESSES**

WHY IT'S CHALLENGING:

- It's tempting to just do more instead of better
- Fixing things takes time and money
- You have to change how things work
- People resist change
- You have to invest in improvement without immediate payoff

BUT IT'S WORTH IT BECAUSE:

- Things start working smoothly
- You waste less money
- People are more productive
- You can grow without breaking things

REMEMBER

The key to Stage 6 is patience. Making things better takes time. You can't rush optimization. You have to:

- Find what's not working well
- Figure out why
- Create a better way
- Test it
- Train people
- Monitor results

About 2.1 million businesses have mastered this optimization phase. The successful ones usually:

- Focus on one improvement at a time
- Measure results carefully
- Train people properly
- Create good systems
- Document everything
- Make sure changes stick

THE SECRET TO SUCCESS

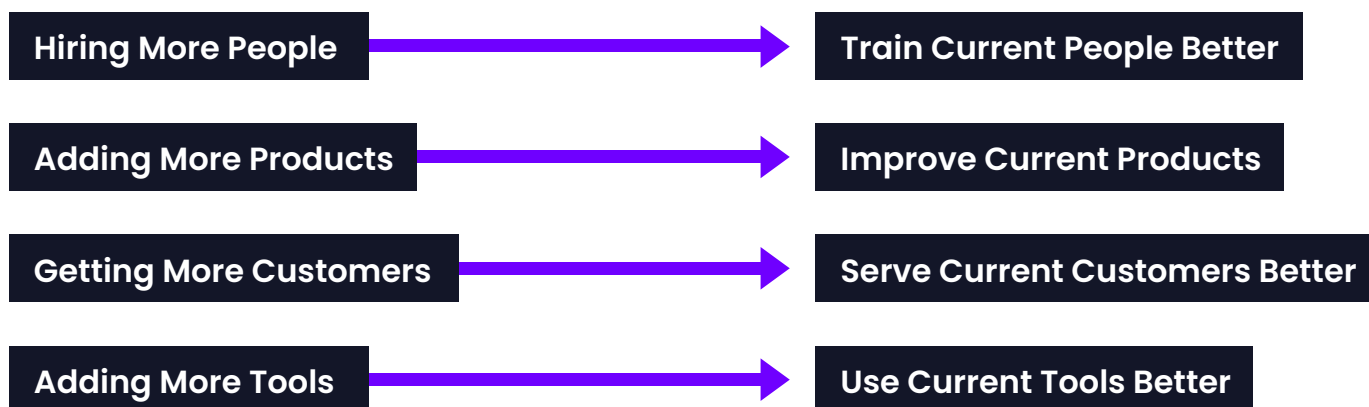
THE REAL SECRET TO STAGE 6 IS REALIZING THAT “BETTER” BEATS “MORE.”



DON'T DO THIS



DO THIS INSTEAD



If you can make this shift from “more” to “better,” you’ll build a stronger business that’s ready for even bigger growth.

Remember, at this stage, success isn’t about doing more—it’s about getting more for what you do.

DO YOU WANT TO SCALE TO THE NEXT STEP?



The entrepreneurs most obsessed with “fast scale” are the ones who grow revenue and hit a wall. To avoid hitting a plateau you can’t breakthrough, you need to build the next foundation for scale. If you want our help to build the right foundations, we’ve just opened up a new scaling workshop. You can grab a seat below.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...



STAGE 5: PRODUCTIZE

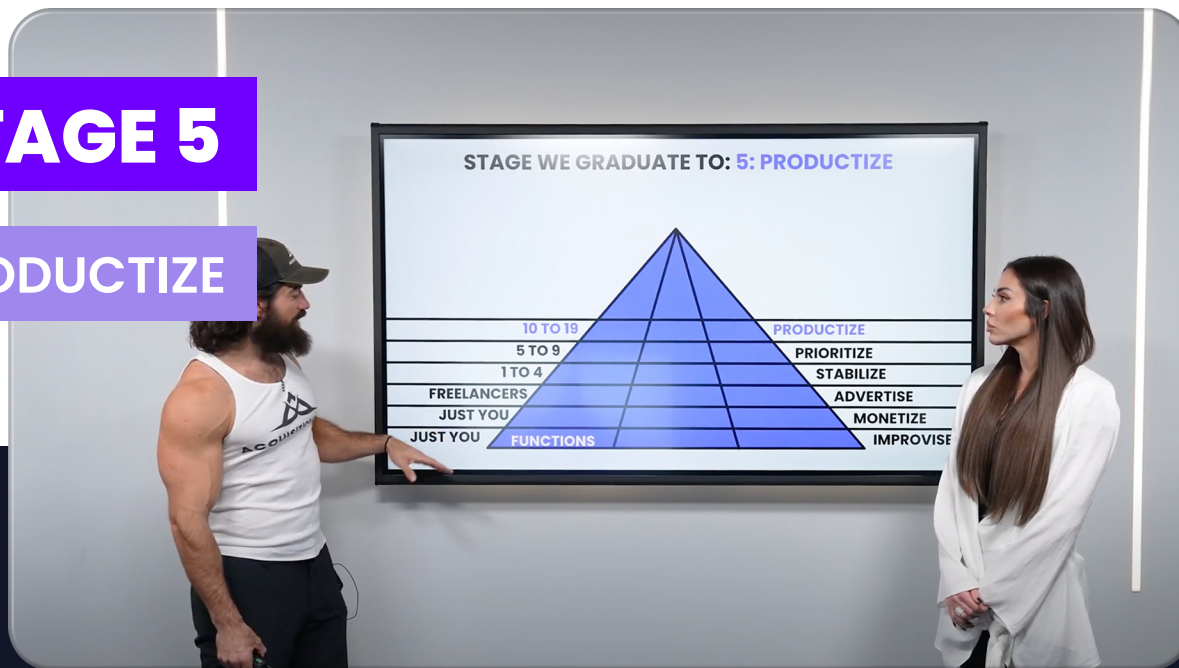
STAGE 5: PRODUCTIZE

HEADCOUNT	10 to 19	
YOUR ROLE	Director	
LEADERSHIP STRUCTURE	1.5 Layers: First 2–3 Managers	
# OF COMPANIES HERE	2,400,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Customers have nothing else to buy from you & churn.	Connect CS & product. Make something new to sell them.
MARKETING	Qualified leads are too expensive and cap your ability to advertise	Spend more on niche down messaging with new offer & raise CAC limit (spend more). Start scoring your leads (you select). Attr. + CRO.
SALES	Customers get sold with unrealistic expectations and refunds/bad reviews become an issue.	Create sales aids/materials. Install weekly game tape between CS & Sales/Marketing for QA & feedback. Track NPS/CSAT/Refund rate by rep.
CUSTOMER SERVICE	Customers come in with unrealistic expectations. Get inconsistent answers.	Build proper CS playbook to onboard & train team to answer Qs same way. WKLY Game tape review. Customer ascension path.
INFORMATION TECH (IT)	Employees using their personal hardware and software and creates issues when people leave. No tracking for leads and customers interacting with your business.	Company provides company owned/controlled hardware and software. Need dashboard/reporting system.
RECRUITING	Have trouble finding higher level roles/managers.	Deliberate promotions from within rather than Peter Principle. Incentivize employee referrals = CAT = cost to acquire talent.
HUMAN RESOURCES (HR)	You're firing people incorrectly and exposed.	Create termination policies and process.
FINANCE	You don't know how much money you can reinvest into growth.	Make a budget (save for big expenses), simple financial forecasting, begin keeping track of tax write offs.
Bottom line	Not making enough per customer. Low LTV:CAC.	Make and sell your second premium product to customers.

YOUR STAGE

STAGE 5

PRODUCTIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 5**



YOUR ROLE

DIRECTOR



HEADCOUNT

10 to 19



BOTTOM LINE

Not making enough
per customer.
Low LTV:CAC.



GRADUATE BY

Make and sell your
second premium
product to customers

WHEN YOU HIT “STAGE 5: PRODUCTIZE”

You’ve grown to 10–19 employees! Around 2.4 million businesses reach this level. You’re now a “Director” with your first 2–3 managers under you. This is when your original product is doing well, but that’s not enough anymore. Your main challenge? You need a second product to keep growing. Specifically, you need to extend LTV – aka – you need to make more per customer. This gives you the cash to scale advertising and recruit even higher level people to your team to keep the growth coming.

THE BIG CHALLENGE: ONE PRODUCT ISN’T ENOUGH

The biggest problem at Stage 5 is that customers buy your product, but then they have nothing else to buy from you. They might even leave (churn) because they need other things you don’t offer. That’s why it’s called the “Productize” stage – you need to create new products to sell to your existing customers. Let’s look at what’s happening:





Products & Sales

- Customers have nothing else to buy from you after their first purchase
- You need to connect customer service with product development
- You need to make something new to sell to existing customers
- Sales people are overpromising and causing refunds and bad reviews
- You need to create sales materials and record customer calls for training



Marketing and Customers

- Getting qualified leads is getting expensive
- Your marketing needs to be more targeted
- Customer support is inconsistent – different people give different answers
- You need a proper playbook for customer service
- You need a plan for moving customers to higher-level products



Tech and Data

- Employees are using their personal computers and software
- When people leave, they take company information with them
- You need company-owned computers and software
- You need a way to track leads and customers
- You need dashboards to show important numbers



People and HR

- It's hard to find managers and higher-level employees
- You should promote good employees from within when possible
- You're firing people incorrectly and could get in trouble
- You need proper termination policies
- You need ways to encourage employee referrals

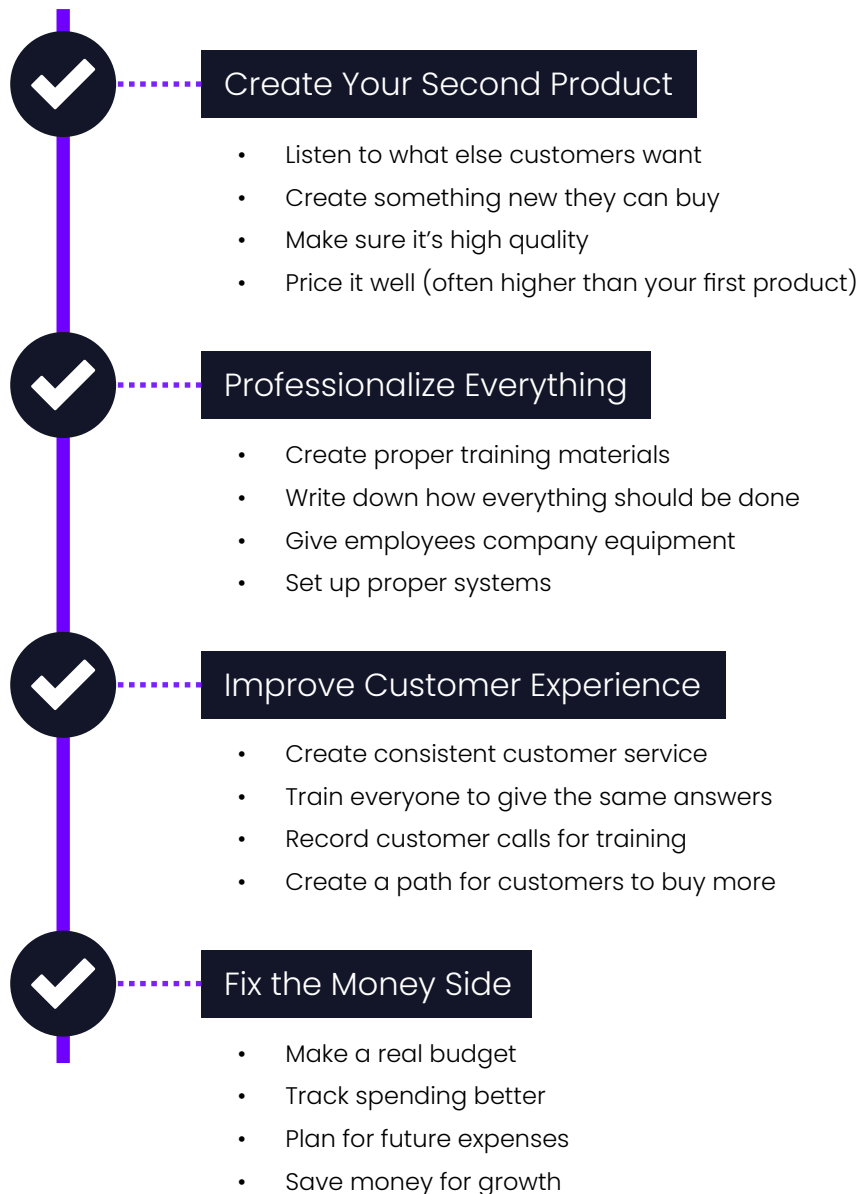
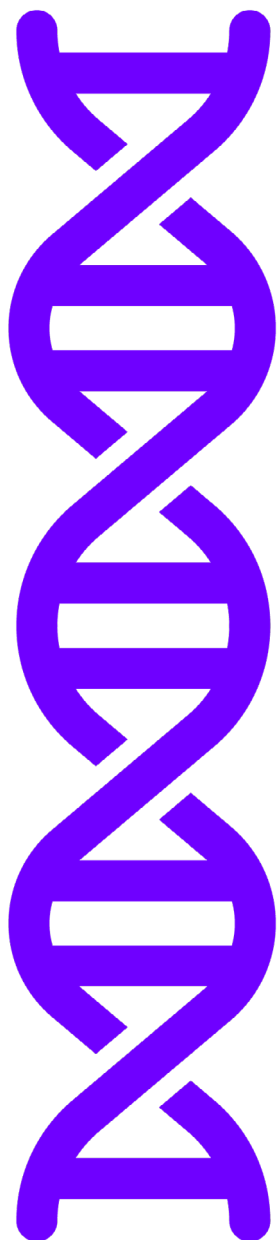


Money Matters

- You don't know how much money you can reinvest in growth
- You need a real budget
- You need simple financial forecasting
- You need to track tax write-offs better

WHAT SUCCESS LOOKS LIKE AT STAGE 5

Your job is to create a second premium product while making everything more professional. Here's what you need to do:



THE BOTTOM LINE

STAGE 5 IS ABOUT GOING FROM “ONE-HIT WONDER” TO HAVING MULTIPLE SUCCESSFUL PRODUCTS. YOU CAN’T GROW JUST BY SELLING MORE OF THE SAME THING. YOU NEED TO:



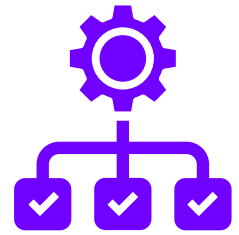
CREATE NEW PRODUCTS



SELL MORE TO EXISTING CUSTOMERS



MAKE EVERYTHING MORE PROFESSIONAL



SET UP PROPER SYSTEMS

This is when your business starts feeling like a real company that could keep growing for years. Instead of just doing one thing well, you’re building a business that can do several things well.

WHY IT’S CHALLENGING:

- Making a second product is hard
- You’re still fixing problems with the first product
- Everything needs to become more professional
- You need to spend money to grow

BUT IT’S WORTH IT BECAUSE:

- You can sell more to existing customers
- You reduce risk by having multiple products
- You build a stronger, more valuable company
- You create paths for future growth

REMEMBER

The key to Stage 5 is balance. You need to keep your first product running well while creating something new. You need to stay profitable while investing in growth. You need to keep current customers happy while attracting new ones.

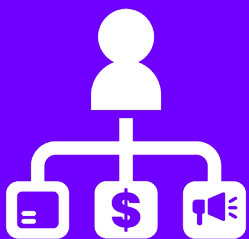
About 2.4 million businesses have figured out this balance. The ones that succeed usually:

- Start small with their second product
- Test it with their best customers

- Make sure it’s truly needed
- Price it well (usually higher than their first product)
- Keep the first product running smoothly while developing the new one

If you can master this balancing act, you’ll have a business that’s built to last and ready to grow even bigger.

THIS IS WHAT'S COMING NEXT...



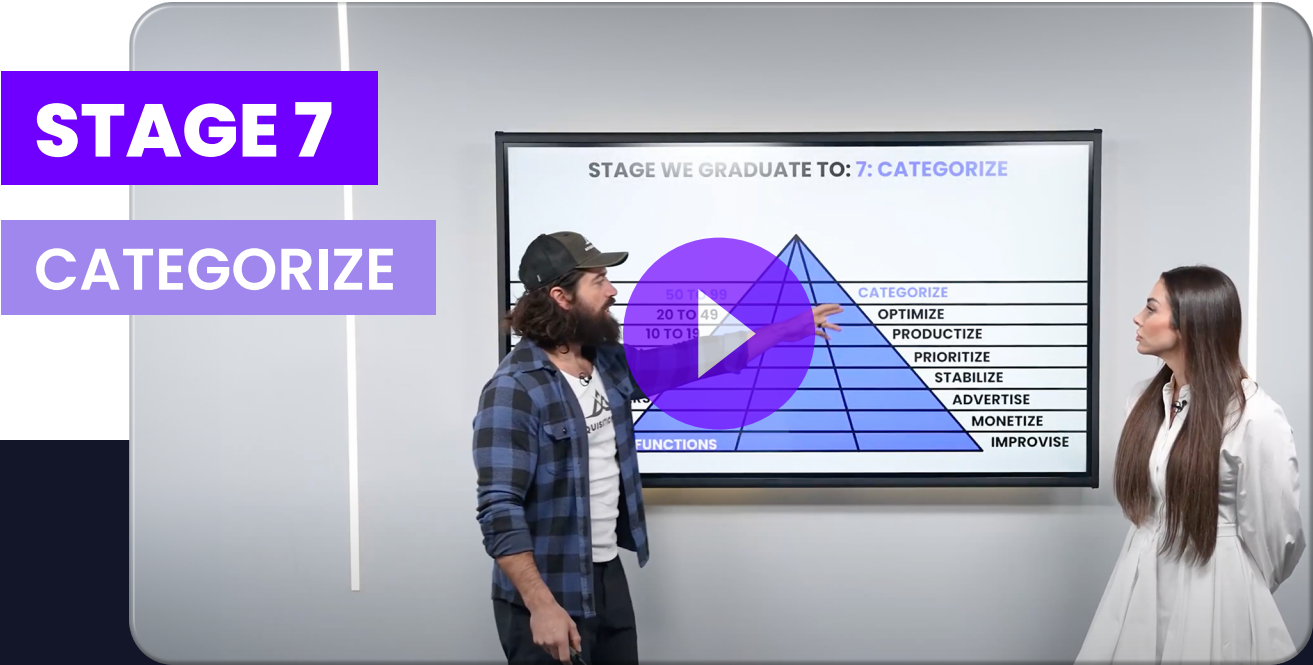
STAGE 7: CATEGORIZE

STAGE 7: CATEGORIZE

HEADCOUNT	50 to 99	
YOUR ROLE	Executive	
LEADERSHIP STRUCTURE	3 Layers: Leadership Team	
# OF COMPANIES HERE	1,200,000	

	CONSTRAINT	TO GRADUATE
PRODUCT	Product outdated. Improvements take too long to roll out.	Fix one problem at a time with focused feature specific teams.
MARKETING	Lead flow is volatile because you only have <u>one way</u> to get customers.	Fund 2nd acq channel with referral process (& track it) & segmented LT nurture by lead score. Pick most similar platform-->or new core 4.
SALES	Leads getting wasted. Not worked consistently.	Better schedule coverage. Create lead nurture checklist & kudos for top show rates.
CUSTOMER SERVICE	CS only reactive. All firefighting.	Create proactive customer journey & communication. Focus on renewals and ascensions.
INFORMATION TECH (IT)	Data, IP, Access all over the place and disorganized.	Network technology. Bring solutions to the cloud. Data host. Centrally locate hardware if onsite.
RECRUITING	Takes too long to hire good people and they get hired elsewhere. You have too many roles open to keep track of candidates and where they're at in the process.	Install Applicant Tracking System to keep track of so many open roles. Pay specialized recruiting firms to keep up.
HUMAN RESOURCES (HR)	There are too many different places for employee information and you have no data	Setup HRIS - Human Resource Information System
FINANCE	Your team starts spending your money stupidly.	QTRLY expense management. Budgets by dept. Cards w limits. Expense approval process. Add insurance coverage & get fancier projections.
Bottom line	Every system is overwhelmed. The business is disorganized.	Triage appropriately.

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 7**



YOUR ROLE

EXECUTIVE



HEADCOUNT

50 to 99



BOTTOM LINE

Every system is
overwhelmed.
The business is
disorganized.



GRADUATE BY

Triage appropriately.

WHEN YOU HIT “STAGE 7: CATEGORIZE”

HERE’S A SIMPLE EXPLANATION OF STAGE 7 (CATEGORIZE) WHEN A BUSINESS HAS 50–99 EMPLOYEES:

At this stage, your business has grown quite a bit – you now have between 50 and 99 employees. Only about 1.2 million companies in the US ever reach this size. You’re no longer just a manager or leader – you’re now an executive with three layers of leadership under you. The main challenge at this stage is that everything feels messy and disorganized. Let me break down what’s happening and what needs to be fixed in each area:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

Money Problems





Products Problems

Your product is starting to feel outdated, and it takes forever to make improvements. Imagine trying to fix up an old car – there are so many things that need work, but you can't fix everything at once. The solution is to make your teams focus on fixing one problem at a time. Instead of everyone trying to fix different things, you have specific teams work on specific features.



Marketing Problems

Your business is like a boat with only one engine – if that engine breaks, you're stuck. Right now you only have one main way of getting customers. This is risky because if something goes wrong with that method, your whole business could be in trouble. The fix is to add a second way to get customers, like starting a referral program where happy customers bring in new ones. You also need to get better at scoring leads (potential customers) so you know which ones are worth pursuing.



Sales Problems

Leads (potential customers) are being wasted because your sales team isn't working them consistently. It's like having a garden but forgetting to water some plants. The solution is to create better schedules so someone is always available to talk to potential customers. You also need to create a checklist for following up with leads and reward salespeople who get lots of customers to show up for meetings.



Customer Service Problems

Your customer service team is always putting out fires instead of preventing problems. It's like being a firefighter who's always rushing to emergencies instead of helping people prevent fires in the first place. The fix is to create a plan that helps prevent customer problems before they happen and focus on getting customers to renew their contracts and buy more stuff.



Tech Problems

Your company's important information, documents, and passwords are scattered everywhere – it's like having important papers spread all over your house instead of organized in filing cabinets. The solution is to move everything to the cloud (online storage) and set up a central place where all company data is stored. If you have physical computers and equipment, those need to be organized too.



Recruiting Problems

It's taking too long to hire good people, and sometimes they accept other jobs before you can hire them. Also, you have so many open positions that it's hard to keep track of all the people applying. The fix is to get special software that helps track job candidates and hire professional recruiting firms to help find people faster.



HR Problems

Employee information is scattered in too many different places – like having one drawer for medical forms, another for tax papers, and another for performance reviews. The solution is to get an HRIS (Human Resource Information System) – think of it as one big digital filing cabinet that keeps all employee information organized in one place.



Money Problems

Your team is spending money without thinking carefully about it. It's like giving everyone a credit card without any rules about how to use it. The fix is to create quarterly (every three months) budgets for each department, give people spending limits, and require approval for big purchases. You also need better insurance coverage and better financial forecasting.

THE BIG PICTURE

At Stage 7, everything feels overwhelming and disorganized. The key is to start sorting things into categories (that's why this stage is called "Categorize") and create systems to handle each category properly. It's like organizing a messy garage – first you sort everything into piles (tools, sports equipment, holiday decorations, etc.), then you create a proper storage system for each category.

THE BOTTOM LINE

YOUR MAIN JOB AT THIS STAGE IS TO SORT THROUGH THE CHAOS AND START ORGANIZING EVERYTHING. THIS MEANS ORGANIZING:



YOUR LEADS
(WHICH TO FOCUS ON)



YOUR CUSTOMERS
(WHICH ONES NEED
THE MOST ATTENTION)



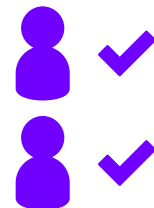
YOUR JOB APPLICANTS
(WHICH ONES
TO INTERVIEW)



YOUR MONEY
(WHAT TO SPEND
ON WHAT)



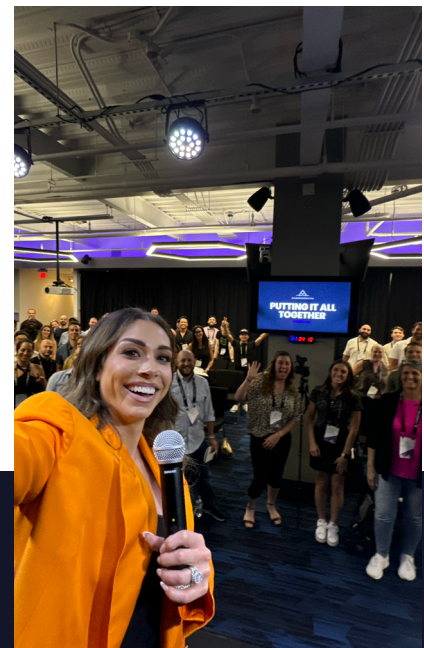
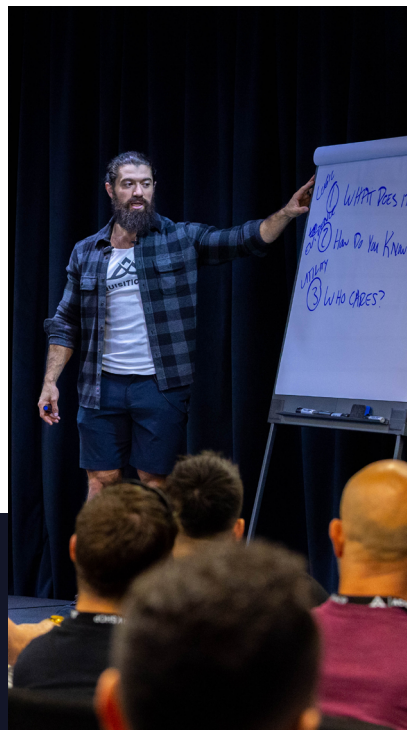
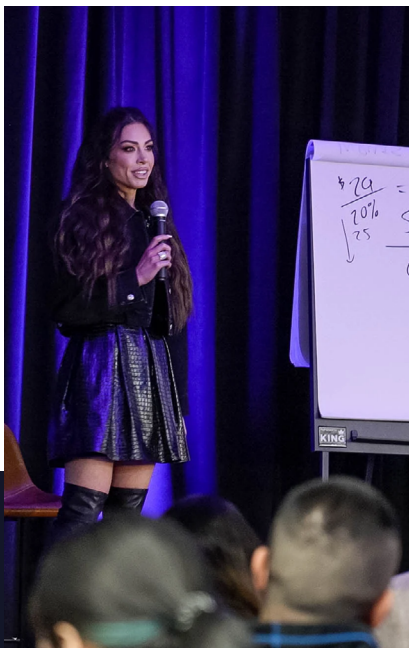
YOUR DATA
(WHERE EVERYTHING
IS STORED)



YOUR EMPLOYEES
(WHO DOES WHAT)

Only after you get everything properly sorted and organized can you move on to the next stage of growth. Think of it as laying the foundation for becoming an even bigger company. You need to segment these categories for what comes next...

DO YOU WANT TO SCALE TO THE NEXT STEP?

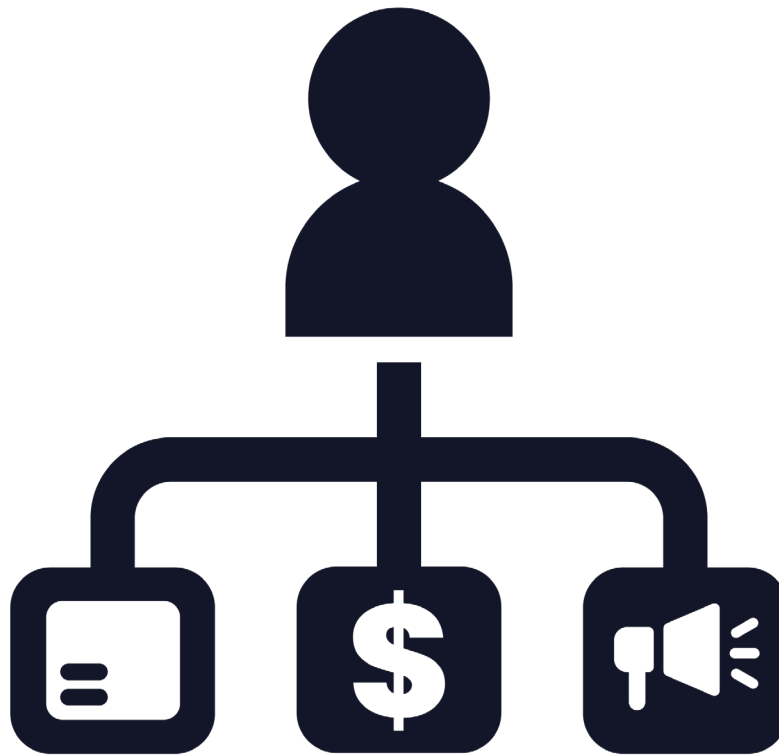


The entrepreneurs most obsessed with “fast scale” are the ones who grow revenue and hit a wall. To avoid hitting a plateau you can’t breakthrough, you need to build the next foundation for scale. If you want our help to build the right foundations, we’ve just opened up a new scaling workshop. You can grab a seat below.

 Check Dates

\$100M SCALING ROADMAP

► STAGE 7: CATEGORIZE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 7: CATEGORIZE



6: OPTIMIZE			7: CATEGORIZE			8: SPECIALIZE		
HEADCOUNT	20 to 49		HEADCOUNT	50 to 99				
YOUR ROLE	Leader		YOUR ROLE	Executive				
LEADERSHIP STRUCTURE	2 Layers: Full Team of Managers		LEADERSHIP STRUCTURE	3 Layers: Leadership Team				
# OF COMPANIES HERE	2,00,000		# OF COMPANIES HERE	1,200,000				
CONSTRAINT			CONSTRAINT			CONSTRAINT		
PRODUCT	Improving two products slower down improvements.	Instal	PRODUCT	Product outdated. Improvements take too long to roll out.	Fix one problem at a time with focused feature specific teams.	PRODUCT	Stale & overvalued customers.	Survey. Prune. Improve thru deletion. Pruned items can become cross-sells
MARKETING	Ads don't convert as well to colder traffic. CAC goes up.	Instal	MARKETING	Lead flow is volatile because you only have <u>one way</u> to get customers.	Fund 2nd acq channel with referral process (& track it) & segmented LT nurture by lead score. Pick most similar platform--> or new core 4.	MARKETING	High quality leads and <u>stale</u> the 2nd CAC program because.	Grow brand with standardized messaging + free value + big positive brand associations.
SALES	Closing efficiency on core product drops. Becomes inconsistent. Refunds go down but so do costs.	Instal	SALES	Leads getting wasted. Not worked consistently.	Better schedule coverage. Create lead nurture checklist & kudos for top show rates.	SALES	Low premium product drops.	Route best leads to best closer (front end & occasions). Automated metrics tracking.
CUSTOMER SERVICE	Churn increases due to volume & new product.	Create the	CUSTOMER SERVICE	CS only reactive. All firefighting.	Create proactive customer journey & communication. Focus on renewals and ascensions.	CUSTOMER SERVICE	Lowly or poorly trained with one another.	Create proactive recommendations to cross-sell other stuff and a blended customer journey.
INFORMATION TECH (IT)	Now people coming in. Old people leaving with IP, data and access.	Cyber emp	INFORMATION TECH (IT)	Data, IP, Access all over the place and disorganized.	Network technology. Bring solutions to the cloud. Data host. Centrally locate hardware if onsite.	INFORMATION TECH (IT)	Lowly performance suffers. Wrong get too far in the process.	Get specialized stack for departments. Internal inquiry process. Staff up if needed. Create departmental policies and service level agreements.
RECRUITING	The number and type of roles you need exceed your current network. (Everyone who's good has a job already.)	You learn	RECRUITING	Takes too long to hire good people and they get hired elsewhere. You have too many roles open to keep track of candidates and where they're at in the process.	Install Applicant Tracking System to keep track of so many open roles. Pay specialized recruiting firms to keep up.	RECRUITING	Lowly performance suffers. Wrong get too far in the process.	Standardized selection process for all incoming talent. Founder final check.
HUMAN RESOURCES (HR)	You can't get higher level talent because they expect full compensation package (benefits, retirement, etc.)	Setup ben	HUMAN RESOURCES (HR)	There are too many different places for employee information and you have no data.	Setup HRIS - Human Resource Information System	HUMAN RESOURCES (HR)	Lowly performance suffers. Wrong get too far in the process.	Setup Group Onboarding (software). Documented Performance Management System. Insurance (FNU). Reinforce cultural values.
FINANCE	You're spending money to grow, but you're not. Money is missing. What's my return?	Score up a	FINANCE	Your team starts spending your money stupidly.	QTRLY expense management. Budgets by dept. Cards w limits. Expense approval process. Add insurance coverage & get fancier projections.	FINANCE	Lowly performance suffers. Wrong get too far in the process.	Re-negotiate rates on everything. Cash to yield accts. Specialize financial roles (especially for mitigation). Internal financial audits evidence.
Bottom line	Everything is inefficient.	On	Bottom line	Every system is overwhelmed. The business is disorganized.	Triage appropriately.	Bottom line	Lowly performance suffers. Wrong get too far in the process.	Create dedicated people and teams for specific tasks.

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 7: CATEGORIZE

HEADCOUNT	50 to 99	
YOUR ROLE	Executive	
LEADERSHIP STRUCTURE	3 Layers: Leadership Team	
# OF COMPANIES HERE	1,200,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Product outdated. Improvements take too long to roll out.	Fix one problem at a time with focused feature specific teams.
MARKETING	Lead flow is volatile because you only have <u>one way</u> to get customers.	Fund 2nd acq channel with referral process (& track it) & segmented LT nurture by lead score. Pick most similar platform-->or new core 4.
SALES	Leads getting wasted. Not worked consistently.	Better schedule coverage. Create lead nurture checklist & kudos for top show rates.
CUSTOMER SERVICE	CS only reactive. All firefighting.	Create proactive customer journey & communication. Focus on renewals and ascensions.
INFORMATION TECH (IT)	Data, IP, Access all over the place and disorganized.	Network technology. Bring solutions to the cloud. Data host. Centrally locate hardware if onsite.
RECRUITING	Takes too long to hire good people and they get hired elsewhere. You have too many roles open to keep track of candidates and where they're at in the process.	Install Applicant Tracking System to keep track of so many open roles. Pay specialized recruiting firms to keep up.
HUMAN RESOURCES (HR)	There are too many different places for employee information and you have no data	Setup HRIS - Human Resource Information System
FINANCE	Your team starts spending your money stupidly.	QTRLY expense management. Budgets by dept. Cards w limits. Expense approval process. Add insurance coverage & get fancier projections.
Bottom line	Every system is overwhelmed. The business is disorganized.	Triage appropriately.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



Repeat themes to be aware of



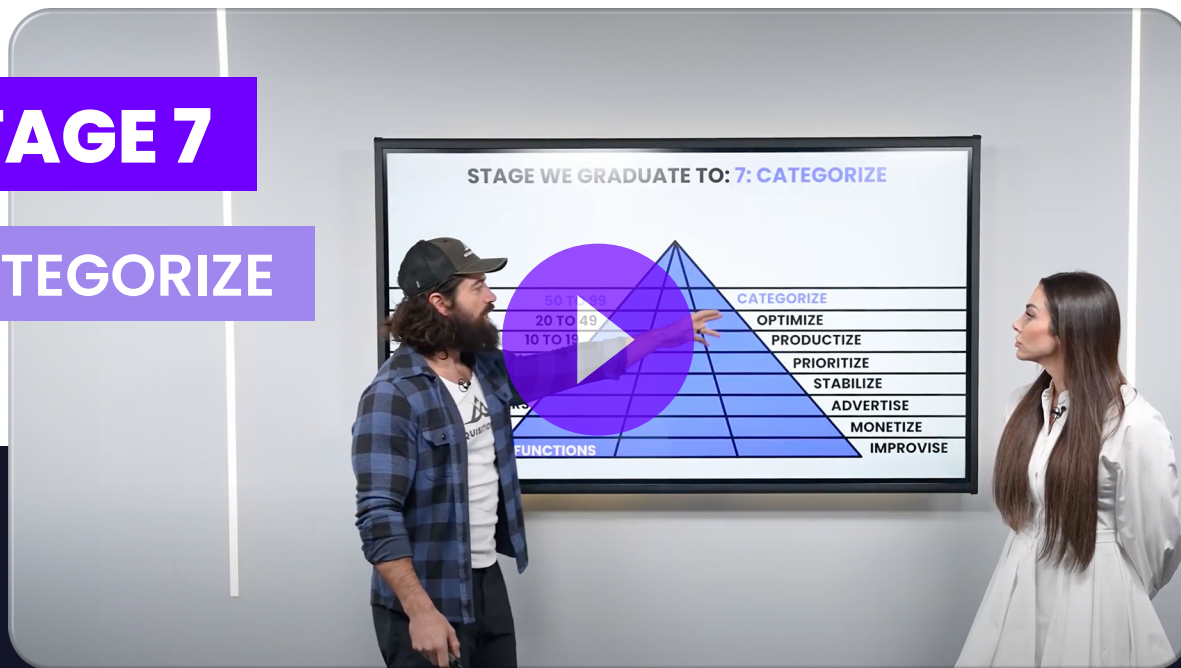
How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE

STAGE 7

CATEGORIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 7**



YOUR ROLE

EXECUTIVE



HEADCOUNT

50 to 99



BOTTOM LINE

Every system is
overwhelmed.
The business is
disorganized.



GRADUATE BY

Triage appropriately.

WHEN YOU HIT “STAGE 7: CATEGORIZE”

HERE’S A SIMPLE EXPLANATION OF STAGE 7 (CATEGORIZE) WHEN A BUSINESS HAS 50–99 EMPLOYEES:

At this stage, your business has grown quite a bit – you now have between 50 and 99 employees. Only about 1.2 million companies in the US ever reach this size. You’re no longer just a manager or leader – you’re now an executive with three layers of leadership under you. The main challenge at this stage is that everything feels messy and disorganized. Let me break down what’s happening and what needs to be fixed in each area:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

Money Problems





Products Problems

Your product is starting to feel outdated, and it takes forever to make improvements. Imagine trying to fix up an old car – there are so many things that need work, but you can't fix everything at once. The solution is to make your teams focus on fixing one problem at a time. Instead of everyone trying to fix different things, you have specific teams work on specific features.



Marketing Problems

Your business is like a boat with only one engine – if that engine breaks, you're stuck. Right now you only have one main way of getting customers. This is risky because if something goes wrong with that method, your whole business could be in trouble. The fix is to add a second way to get customers, like starting a referral program where happy customers bring in new ones. You also need to get better at scoring leads (potential customers) so you know which ones are worth pursuing.



Sales Problems

Leads (potential customers) are being wasted because your sales team isn't working them consistently. It's like having a garden but forgetting to water some plants. The solution is to create better schedules so someone is always available to talk to potential customers. You also need to create a checklist for following up with leads and reward salespeople who get lots of customers to show up for meetings.



Customer Service Problems

Your customer service team is always putting out fires instead of preventing problems. It's like being a firefighter who's always rushing to emergencies instead of helping people prevent fires in the first place. The fix is to create a plan that helps prevent customer problems before they happen and focus on getting customers to renew their contracts and buy more stuff.



Tech Problems

Your company's important information, documents, and passwords are scattered everywhere – it's like having important papers spread all over your house instead of organized in filing cabinets. The solution is to move everything to the cloud (online storage) and set up a central place where all company data is stored. If you have physical computers and equipment, those need to be organized too.



Recruiting Problems

It's taking too long to hire good people, and sometimes they accept other jobs before you can hire them. Also, you have so many open positions that it's hard to keep track of all the people applying. The fix is to get special software that helps track job candidates and hire professional recruiting firms to help find people faster.



HR Problems

Employee information is scattered in too many different places – like having one drawer for medical forms, another for tax papers, and another for performance reviews. The solution is to get an HRIS (Human Resource Information System) – think of it as one big digital filing cabinet that keeps all employee information organized in one place.



Money Problems

Your team is spending money without thinking carefully about it. It's like giving everyone a credit card without any rules about how to use it. The fix is to create quarterly (every three months) budgets for each department, give people spending limits, and require approval for big purchases. You also need better insurance coverage and better financial forecasting.

THE BIG PICTURE

At Stage 7, everything feels overwhelming and disorganized. The key is to start sorting things into categories (that's why this stage is called "Categorize") and create systems to handle each category properly. It's like organizing a messy garage – first you sort everything into piles (tools, sports equipment, holiday decorations, etc.), then you create a proper storage system for each category.

THE BOTTOM LINE

YOUR MAIN JOB AT THIS STAGE IS TO SORT THROUGH THE CHAOS AND START ORGANIZING EVERYTHING. THIS MEANS ORGANIZING:



YOUR LEADS
(WHICH TO FOCUS ON)



YOUR CUSTOMERS
(WHICH ONES NEED
THE MOST ATTENTION)



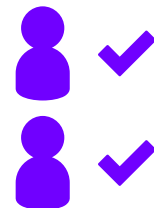
YOUR JOB APPLICANTS
(WHICH ONES
TO INTERVIEW)



YOUR MONEY
(WHAT TO SPEND
ON WHAT)



YOUR DATA
(WHERE EVERYTHING
IS STORED)



YOUR EMPLOYEES
(WHO DOES WHAT)

Only after you get everything properly sorted and organized can you move on to the next stage of growth. Think of it as laying the foundation for becoming an even bigger company. You need to segment these categories for what comes next...

DO YOU WANT TO SCALE TO THE NEXT STEP?

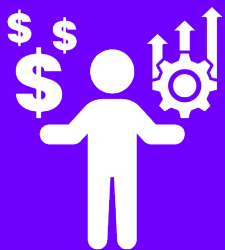


Two words: Organized Chaos. Your business has become larger than most but everything feels disorganized & your systems are bursting at the seams. You have to triage appropriately. If you want the help of people who have done this (We have 4 portfolio companies each worth in excess of \$100M), you can see how we do this at a Scaling Workshop.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...



STAGE 6: OPTIMIZE

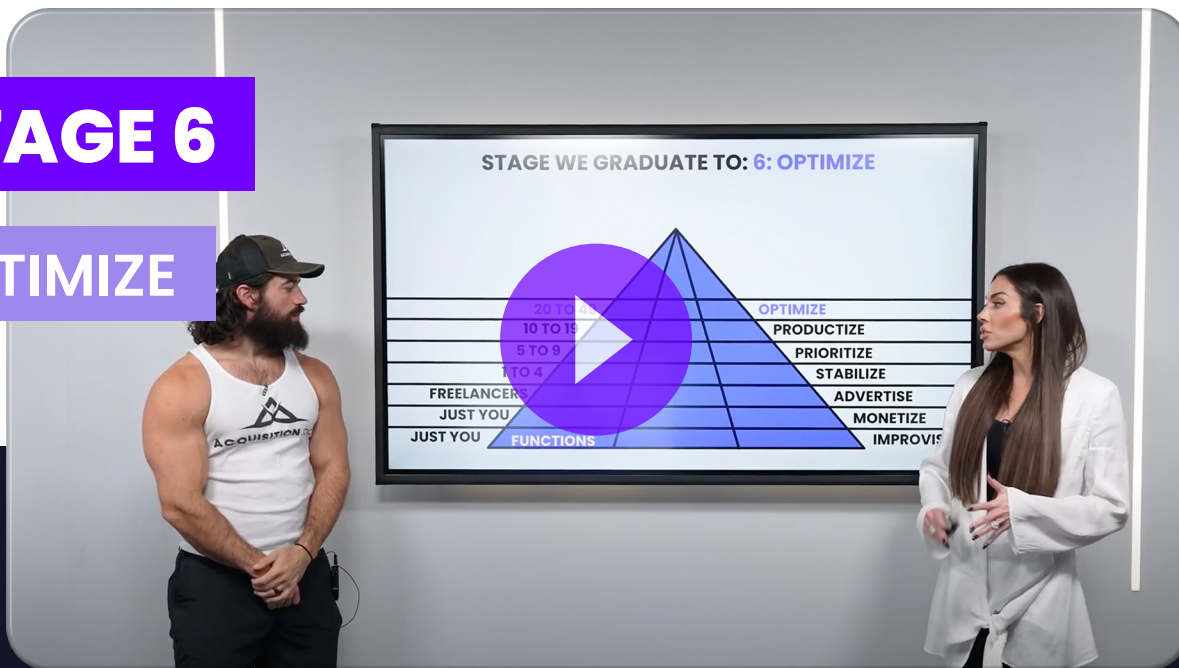
STAGE 6: OPTIMIZE

HEADCOUNT	20 to 49	
YOUR ROLE	Leader	
LEADERSHIP STRUCTURE	2 Layers: Full Team of Managers	
# OF COMPANIES HERE	2,100,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Improving two products slows down improvements.	Install incremental product improvement process for both products.
MARKETING	Ads don't convert as well to colder traffic. CAC goes up.	Implement Ad assembly process to increase volume.
SALES	Closing efficiency on core product drops. Becomes inconsistent. Refunds go down but so do closes.	Install sales training system, individual coaching, and team cadence.
CUSTOMER SERVICE	Churn increases due to volume & new product.	Create customer segmentation by cohort and activation points.
INFORMATION TECH (IT)	New people coming in. Old people leaving with IP, data, and access.	Cyber security. Malware. Password protection from and for employees. Onboarding and offboarding employees.
RECRUITING	The number and type of roles you need exceed your current network. (Everyone who's good has a job already.)	You learn to headhunt higher level roles. Add multiple interviews filtering for different skills.
HUMAN RESOURCES (HR)	You can't get higher level talent because they expect full compensation package (benefits, retirement, etc)	Setup benefits, retirement, and advanced compensation plans
FINANCE	You're spending money to grow, but you're not. Money is missing. Where's my return?	Scale up AR/AP. Get more granular financial data. Balance sheet. Begin making quarterly tax payments.
Bottom line	Everything is inefficient.	Grow by doing everything better rather than more.

YOUR STAGE

STAGE 6

OPTIMIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 6**



YOUR ROLE

Leader



HEADCOUNT

20-49



BOTTOM LINE

Everything is
inefficient



GRADUATE BY

Doing better rather
than doing more

WHEN YOU HIT “STAGE 6: OPTIMIZE”

You’ve grown to 20–49 employees! About 2.1 million businesses reach this level. You’re now a “Leader” with a full team of managers under you. The interesting thing about this stage? Your main challenge isn’t doing more—it’s doing everything better. You have two products, but they both need improvement.

THE BIG CHALLENGE: EVERYTHING COULD BE BETTER

The biggest problem at Stage 6 is that having more people doesn’t automatically make things work better. Things are actually getting less efficient. That’s why it’s called the “Optimize” stage—you need to make everything work better, not just bigger. Let’s look at what’s happening...

Products and Marketing

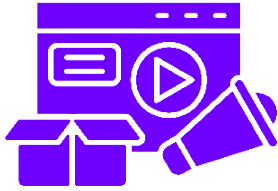
Sales and Customer Service

Tech and Security

People and HR

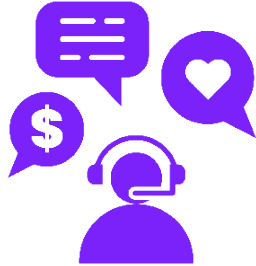
Money Matters





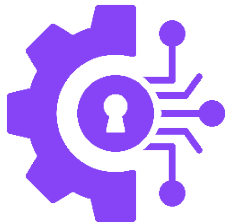
Products and Marketing

- Improving two products at once is slowing everything down
- You need a process to improve both products bit by bit
- Your ads don't work as well with colder audiences
- Your marketing costs (CAC) are going up
- You need a better way to create ads at scale



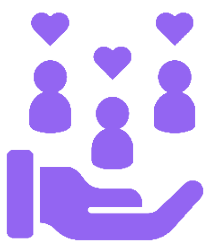
Sales and Customer Service

- Your core product isn't closing as well as it used to
- Sales team needs real training now
- Customer churn is increasing because you have more products
- You need to group customers by when they joined and how they use products
- You need to track more detailed customer success metrics



Tech and Security

- New people are joining, others are leaving
- Company data and access is at risk
- You need real cybersecurity
- You need better password protection
- You need proper employee onboarding and offboarding for tech



People and HR

- You can't find enough good people through your network
- Everyone who's good already has a job
- You need multiple interviews for different skills
- High-level talent wants full benefits packages
- You need retirement plans and better benefits

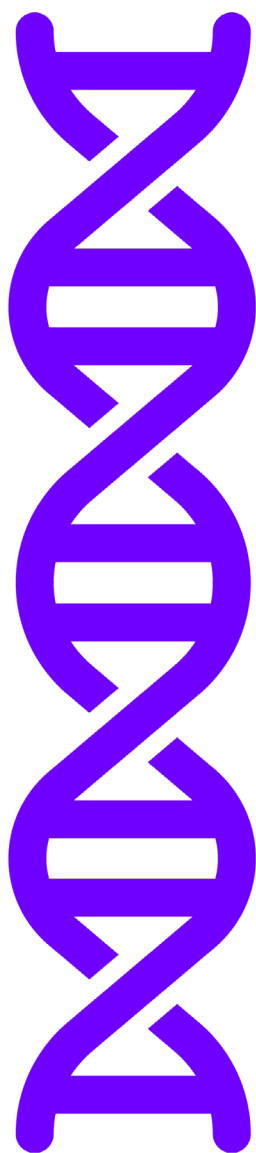


Money Matters

- You're spending money on growth but not growing
- Money seems to be missing or wasted
- You need more detailed financial data
- You need a real balance sheet
- You need to pay taxes quarterly

WHAT SUCCESS LOOKS LIKE AT STAGE 6

**YOUR JOB IS TO MAKE EVERYTHING WORK BETTER.
HERE'S WHAT YOU NEED TO DO:**



Fix The Basics

- Make your core systems work better
- Train your people better
- Track everything important
- Fix the biggest inefficiencies first



Protect Your Business

- Set up proper security
- Protect company data
- Get proper insurance
- Create proper processes



Make Things Measurable

- Track important numbers
- Measure employee performance
- Monitor customer satisfaction
- Watch financial metrics



Build For The Future

- Create training systems
- Set up better benefits
- Improve your technology
- Make things scalable

THE BOTTOM LINE

STAGE 6 IS ABOUT MAKING EVERYTHING WORK BETTER, NOT JUST BIGGER. INSTEAD OF JUST ADDING MORE PEOPLE OR DOING MORE THINGS, YOU NEED TO:



**IMPROVE
EXISTING SYSTEMS**



**MAKE THINGS
MORE EFFICIENT**



**FIX WHAT'S
BROKEN**



**BUILD BETTER
PROCESSES**

WHY IT'S CHALLENGING:

- It's tempting to just do more instead of better
- Fixing things takes time and money
- You have to change how things work
- People resist change
- You have to invest in improvement without immediate payoff

BUT IT'S WORTH IT BECAUSE:

- Things start working smoothly
- You waste less money
- People are more productive
- You can grow without breaking things

REMEMBER

The key to Stage 6 is patience. Making things better takes time. You can't rush optimization. You have to:

- Find what's not working well
- Figure out why
- Create a better way
- Test it
- Train people
- Monitor results

About 2.1 million businesses have mastered this optimization phase. The successful ones usually:

- Focus on one improvement at a time
- Measure results carefully
- Train people properly
- Create good systems
- Document everything
- Make sure changes stick

THE SECRET TO SUCCESS

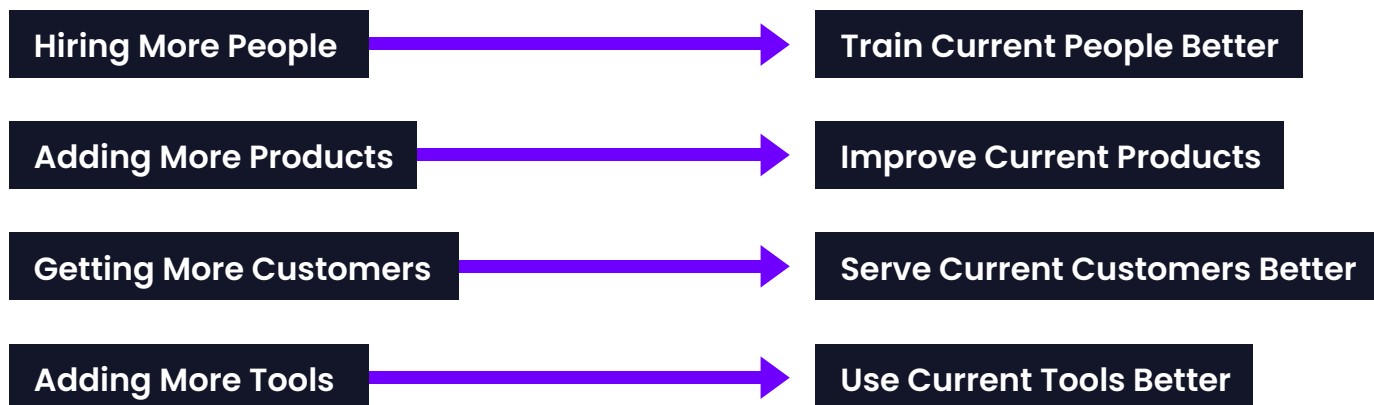
THE REAL SECRET TO STAGE 6 IS REALIZING THAT “BETTER” BEATS “MORE.”



DON'T DO THIS



DO THIS INSTEAD



If you can make this shift from “more” to “better,” you’ll build a stronger business that’s ready for even bigger growth.

Remember, at this stage, success isn’t about doing more—it’s about getting more for what you do.

THIS IS WHAT'S COMING NEXT...



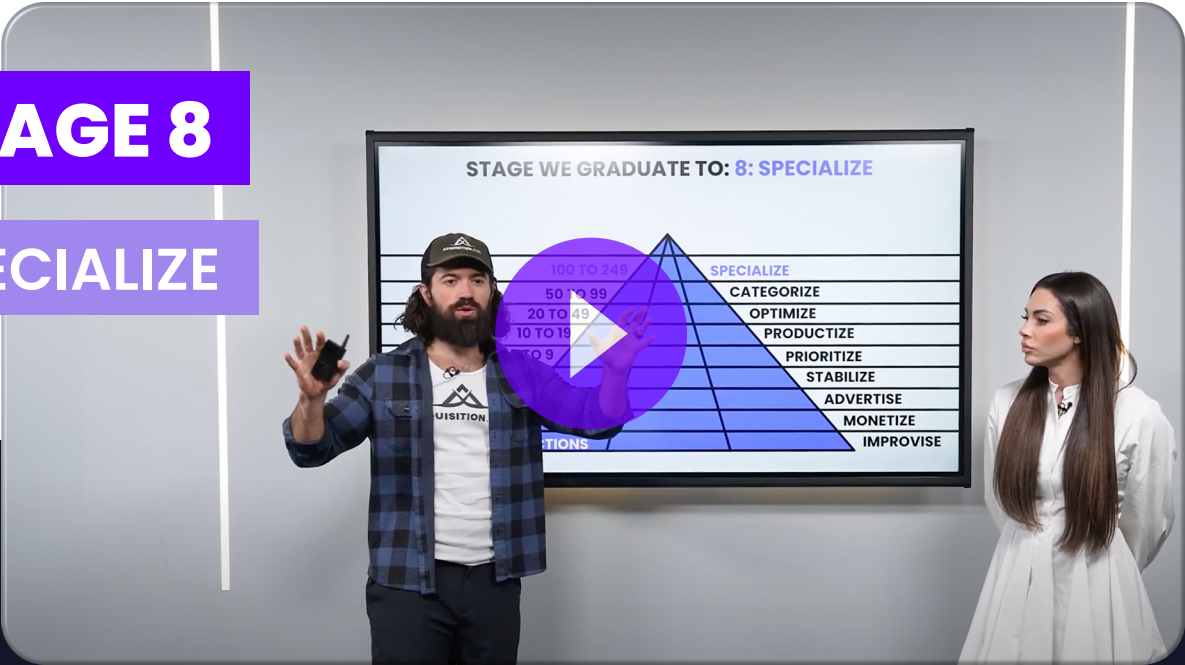
STAGE 8: SPECIALIZE

STAGE 8: SPECIALIZE

HEADCOUNT	100 to 249	
YOUR ROLE	President	
LEADERSHIP STRUCTURE	4 Layers: Executive Team	
# OF COMPANIES HERE	900,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Product too many features & overwhelms customers.	Survey. Prune. Improve thru deletion. Pruned items can become cross-sells.
MARKETING	Broader creative brings in lower quality leads and <u>dilutes the brand</u> . CAC goes up again because.	Grow brand with standardized messaging + free value + big positive brand associations.
SALES	Closing efficiency on premium product drops.	Route best leads to best closers (front end & ascensions). Automated metrics tracking.
CUSTOMER SERVICE	Multiple customer journeys conflict or poorly timed with one another.	Create proactive recommendations to cross-sell other stuff and a blended customer journey.
INFORMATION TECH (IT)	Departments outgrow general software and need specific solutions. Too many internal inquiries. No inquiry process. Departmental policies.	Get specialized stack for departments. Internal inquiry process. Staff up if needed. Create departmental policies and service level agreements.
RECRUITING	Recruiters hold inconsistent standards and culture suffers. Wrong candidates get too far in the process.	Standardized selection process for all incoming talent. Founder final check.
HUMAN RESOURCES (HR)	So many new and existing employees, performance suffers. Compliance issues and complaints skyrocket	Setup Group Onboarding (software). Documented Performance Management Systems. Insurance (EPLI). Reinforce cultural values.
FINANCE	You're still paying retail for everything (and getting overcharged.) Cash is unprotected & getting 0% returns.	Re-negotiate rates on everything. Cash to yield accts. Specialize finance roles (especially tax mitigation). Internal financial audits cadence.
Bottom line	No one is good enough to know everything.	Create dedicated people and teams for specific tasks.

YOUR STAGE

STAGE 8
SPECIALIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 8**



YOUR ROLE

PRESIDENT



HEADCOUNT

100 to 249



BOTTOM LINE

No one is good
enough to know
everything



GRADUATE BY

Create dedicated
people and teams
for specific tasks

WHEN YOU HIT “STAGE 8: SPECIALIZE”

AT THIS STAGE, YOUR COMPANY IS GETTING PRETTY BIG—YOU HAVE BETWEEN 100 AND 249 EMPLOYEES.

Only about 900,000 companies in the US reach this size. You’re now a President with four layers of management under you. The main challenge at this stage is that no one person can be good at everything anymore – you need specialists.

LET ME BREAK DOWN WHAT’S HAPPENING IN EACH AREA:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

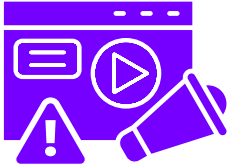
Money Problems





Products Problems

Your product has become like a Swiss Army knife with too many features – it's confusing customers. Imagine a TV remote with 100 buttons when most people only use 10 of them. The solution is to survey customers to find out what features they actually use, remove the ones they don't, and maybe turn some removed features into separate products you can sell separately. It's like turning that complicated remote into two simpler ones.



Marketing Problems

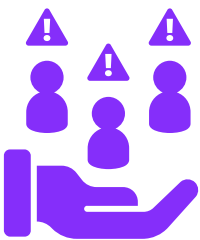
Your advertising isn't working as well as it used to, and it's getting more expensive to get customers. It's like shouting in a crowded room – nobody pays attention anymore because there's too much noise. The fix is to focus on building your brand (like Nike or Apple) instead of just selling products. This means:

- Creating a clear, simple message about who you are
- Giving away valuable free stuff to build trust
- Getting associated with other trusted brands or people



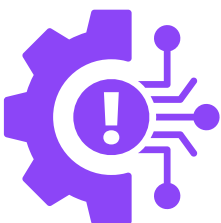
Sales Problems

Your best salespeople aren't closing as many deals as they used to. The fix is to send your best leads to your best closers and use automatic tracking to measure everything. Think of it like a restaurant sending its most experienced waiters to handle the biggest parties and most important customers.



Customer Service Problems

Different types of customers are getting conflicting information and having confusing experiences. Imagine going to a restaurant where one waiter tells you something costs \$10 and another says it's \$20. The solution is to create one clear path for customers who buy multiple products and make smart recommendations about what else they might want to buy.



Tech Problems

Different departments need different software, and everyone is asking IT for help but there's no system for handling requests. It's like having one handyman trying to fix everyone's problems in a big apartment building with no way to organize who needs what. The fix is to:

- Get specialized software for each department
- Create a system for making IT requests
- Hire more IT people if needed
- Create clear rules about what IT will and won't do



Recruiting Problems

Your recruiters aren't consistent about who they hire, and this is hurting your company culture. It's like having different doormen at a club who each let in different types of people. The solution is to create one standard process for selecting new employees and have the founder do a final check on important hires to make sure they're right for the company.



HR Problems

With so many employees, performance is suffering and people are starting to complain more. The fix is to:

- Get software to help train groups of new employees
- Create clear systems for managing performance
- Get insurance to protect against lawsuits
- Keep reinforcing what your company believes in



Money Problems

You're paying full price for everything and not making any money on your spare cash. It's like paying retail prices at stores when you could be getting wholesale discounts. The solution is to:

- Renegotiate prices with everyone who sells to you
- Put extra cash in accounts that earn interest
- Get specialists to handle different money tasks (especially taxes)
- Do regular internal audits to make sure no money is being wasted

THE BIG PICTURE

At Stage 8, the main challenge is that being a "jack of all trades" doesn't work anymore. You need specialists—people who are really good at specific things. Think about a hospital:

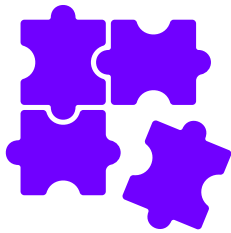
- You don't want a general doctor doing heart surgery
- You want a heart specialist
- And you want that heart specialist to focus only on hearts, not try to do everything

This is true for every part of your business:

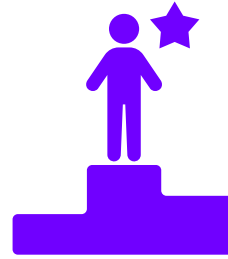
- Some salespeople should only sell certain products
- Some customer service people should only handle certain types of customers
- Some tech people should only handle certain types of software
- Some finance people should only handle certain types of money tasks

THE BOTTOM LINE

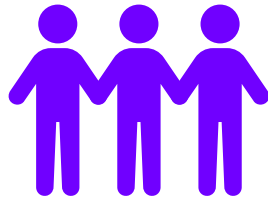
YOUR MAIN JOB AT THIS STAGE IS TO CREATE DEDICATED TEAMS OF SPECIALISTS. NO MORE “EVERYONE DOES EVERYTHING.” EACH PERSON NEEDS TO FOCUS ON WHAT THEY’RE BEST AT. THIS MEANS:



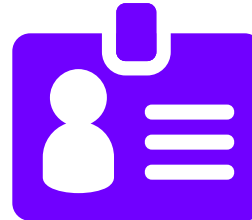
**BREAKING BIG JOBS
INTO SMALLER,
SPECIALIZED PIECES**



**FINDING PEOPLE WHO
ARE REALLY GOOD AT
THOSE SPECIFIC PIECES**



**CREATING SYSTEMS TO
HELP THESE SPECIALISTS
WORK TOGETHER**

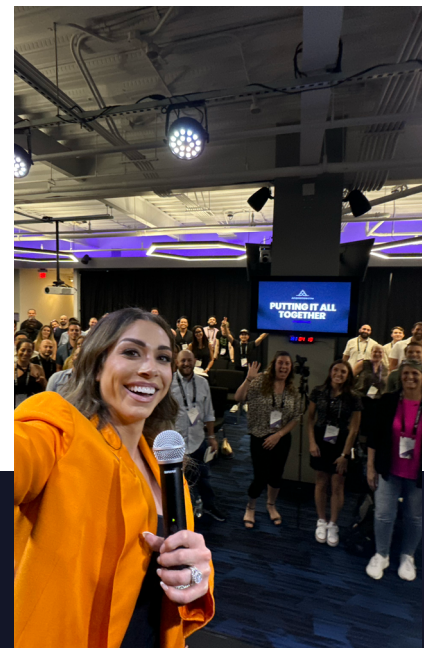
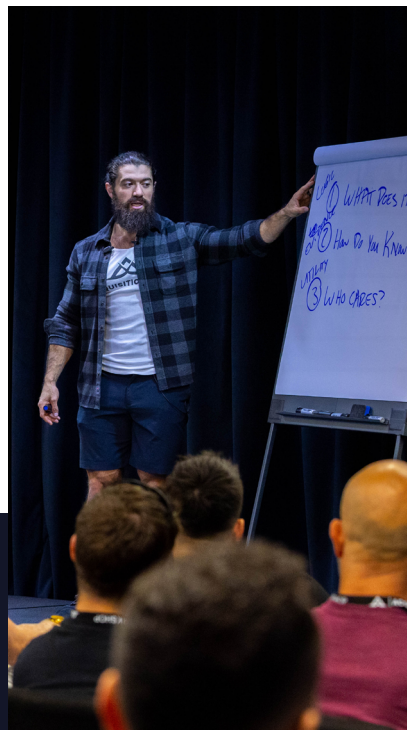
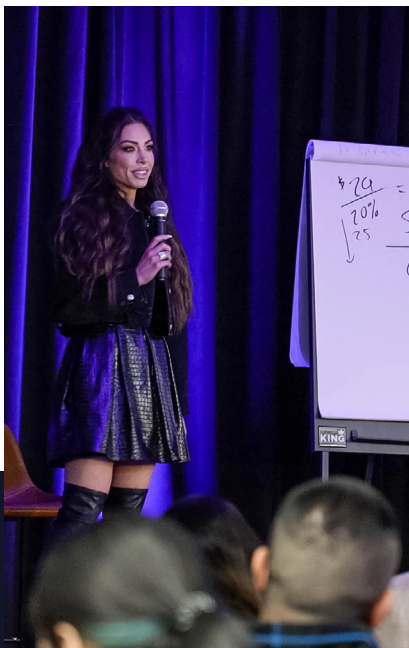


**MAKING SURE
EVERYONE KNOWS
THEIR SPECIFIC ROLE**

This is why this stage is called “Specialize”—it’s all about getting really good at specific things instead of trying to be okay at everything. It’s like turning your company from a high school (where teachers teach multiple subjects) into a university (where professors specialize in one specific thing).

After you get the right specialists in the right roles, you can move to the next stage. This hyper specialization is what can create outsized returns to capitalize on with your next big growth bet.

DO YOU WANT TO SCALE TO THE NEXT STEP?



Two words: Organized Chaos. Your business has become larger than most but everything feels disorganized & your systems are bursting at the seams. You have to triage appropriately. If you want the help of people who have done this (We have 4 portfolio companies each worth in excess of \$100M), you can see how we do this at a Scaling Workshop.

 Check Dates

\$100M SCALING ROADMAP

► STAGE 8: SPECIALIZE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 8: SPECIALIZE



7: CATEGORIZE			8: SPECIALIZE			9: CAPITALIZE		
HEADCOUNT	50 to 99		HEADCOUNT	100 to 249				
YOUR ROLE	Executive		YOUR ROLE	President				
LEADERSHIP STRUCTURE	3 layers: Leadership Team		LEADERSHIP STRUCTURE	4 Layers: Executive Team				
# OF COMPANIES HERE	1200,000		# OF COMPANIES HERE	900,000				
CONSTRAINT			CONSTRAINT			TO GRADUATE		
PRODUCT	Product outdated. Improvements take too long to roll out.	Find 2nd future	PRODUCT	Product too many features & overwhelms customers.	Survey. Prune. Improve thru deletion. Pruned items can become cross-sells.	CONSTRAINT		
MARKETING	Lead flow is volatile because you only have <u>grub</u> to get customers.	Refine sales	MARKETING	Broader creative brings in lower quality leads and <u>dilutes the brand</u> . CAC goes up again because.	Grow brand with standardized messaging + free value + big positive brand associations.	TO GRADUATE		
SALES	Leads getting wasted. Not worked consistently.	Create prod	SALES	Closing efficiency on premium product drops.	Route best leads to best closers (front end & ascensions). Automated nurture tracking.	CONSTRAINT		
CUSTOMER SERVICE	CS only reactive. All firefighting.	Improv CS	CUSTOMER SERVICE	Multiple customer journeys conflict or poorly timed with one another.	Create proactive recommendations to cross-sell other stuff and a blended customer journey.	TO GRADUATE		
INFORMATION TECH (IT)	Quick, B. Access all over the place and disorganized.	Initial App	INFORMATION TECH (IT)	Departments outgrow general software and need specific solutions. Too many internal inquiries. No inquiry process. Departmental policies.	Get specialized stock for departments. Internal inquiry process. Staff up if needed. Create departmental policies and service level agreements.	CONSTRAINT		
RECRUITING	Takes too long to hire good people and they get hired elsewhere. You have too many roles open to keep track of candidates and where they're up in the process.		RECRUITING	Recruiters hold inconsistent standards and culture suffers. Wrong candidates get too far in the process.	Standardized selection process for all incoming talent. Founder final check.	TO GRADUATE		
HUMAN RESOURCES (HR)	There are too many different places for employee information and you have no data.	QIRLY app	HUMAN RESOURCES (HR)	So many new and exiting employees, performance suffers. Compliance issues and complaints skyrocket	Setup Group Onboarding (software). Documented Performance Management Systems. Insurance (EPL). Reinforce cultural values.	CONSTRAINT		
FINANCE	Your team starts spending your money stupidly.		FINANCE	You're still paying retail for everything (and getting overcharged). Cash is unprotected & getting 0% returns.	Re-negotiate rates on everything. Cash to yield accts. Specialize finance roles (especially tax mitigation). Internal financial audits cadence.	TO GRADUATE		
Bottom line			Bottom line			Bottom line		
Every system is overwhelmed. The business is disorganized.			No one is good enough to know everything.			Create dedicated people and teams for specific tasks.		

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 8: SPECIALIZE

HEADCOUNT	100 to 249	
YOUR ROLE	President	
LEADERSHIP STRUCTURE	4 Layers: Executive Team	
# OF COMPANIES HERE	900,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Product too many features & overwhelms customers.	Survey. Prune. Improve thru deletion. Pruned items can become cross-sells.
MARKETING	Broader creative brings in lower quality leads and <u>dilutes the brand</u> . CAC goes up again because.	Grow brand with standardized messaging + free value + big positive brand associations.
SALES	Closing efficiency on premium product drops.	Route best leads to best closers (front end & ascensions). Automated metrics tracking.
CUSTOMER SERVICE	Multiple customer journeys conflict or poorly timed with one another.	Create proactive recommendations to cross-sell other stuff and a blended customer journey.
INFORMATION TECH (IT)	Departments outgrow general software and need specific solutions. Too many internal inquiries. No inquiry process. Departmental policies.	Get specialized stack for departments. Internal inquiry process. Staff up if needed. Create departmental policies and service level agreements.
RECRUITING	Recruiters hold inconsistent standards and culture suffers. Wrong candidates get too far in the process.	Standardized selection process for all incoming talent. Founder final check.
HUMAN RESOURCES (HR)	So many new and existing employees, performance suffers. Compliance issues and complaints skyrocket	Setup Group Onboarding (software). Documented Performance Management Systems. Insurance (EPLI). Reinforce cultural values.
FINANCE	You're still paying retail for everything (and getting overcharged.) Cash is unprotected & getting 0% returns.	Re-negotiate rates on everything. Cash to yield accts. Specialize finance roles (especially tax mitigation). Internal financial audits cadence.
Bottom line	No one is good enough to know everything.	Create dedicated people and teams for specific tasks.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



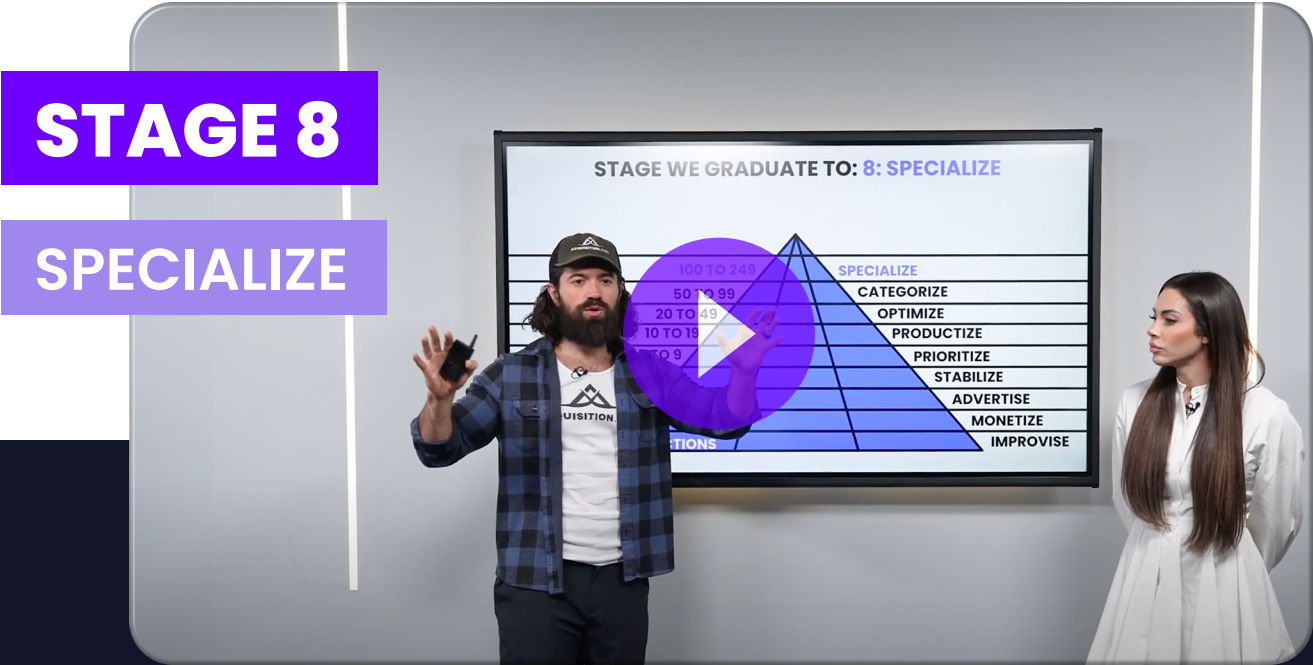
Repeat themes to be aware of



How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 8**



YOUR ROLE

PRESIDENT



HEADCOUNT

100 to 249



BOTTOM LINE

No one is good
enough to know
everything



GRADUATE BY

Create dedicated
people and teams
for specific tasks

WHEN YOU HIT “STAGE 8: SPECIALIZE”

AT THIS STAGE, YOUR COMPANY IS GETTING PRETTY BIG—YOU HAVE BETWEEN 100 AND 249 EMPLOYEES.

Only about 900,000 companies in the US reach this size. You’re now a President with four layers of management under you. The main challenge at this stage is that no one person can be good at everything anymore – you need specialists. Let me break down what’s happening in each area:

LET ME BREAK DOWN WHAT’S HAPPENING IN EACH AREA:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

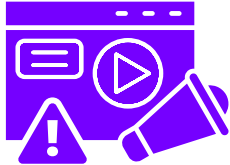
Money Problems





Products Problems

Your product has become like a Swiss Army knife with too many features – it's confusing customers. Imagine a TV remote with 100 buttons when most people only use 10 of them. The solution is to survey customers to find out what features they actually use, remove the ones they don't, and maybe turn some removed features into separate products you can sell separately. It's like turning that complicated remote into two simpler ones.



Marketing Problems

Your advertising isn't working as well as it used to, and it's getting more expensive to get customers. It's like shouting in a crowded room – nobody pays attention anymore because there's too much noise. The fix is to focus on building your brand (like Nike or Apple) instead of just selling products. This means:

- Creating a clear, simple message about who you are
- Giving away valuable free stuff to build trust
- Getting associated with other trusted brands or people



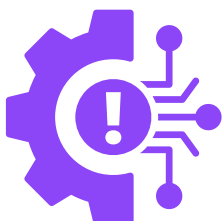
Sales Problems

Your best salespeople aren't closing as many deals as they used to. The fix is to send your best leads to your best closers and use automatic tracking to measure everything. Think of it like a restaurant sending its most experienced waiters to handle the biggest parties and most important customers.



Customer Service Problems

Different types of customers are getting conflicting information and having confusing experiences. Imagine going to a restaurant where one waiter tells you something costs \$10 and another says it's \$20. The solution is to create one clear path for customers who buy multiple products and make smart recommendations about what else they might want to buy.



Tech Problems

Different departments need different software, and everyone is asking IT for help but there's no system for handling requests. It's like having one handyman trying to fix everyone's problems in a big apartment building with no way to organize who needs what. The fix is to:

- Get specialized software for each department
- Create a system for making IT requests
- Hire more IT people if needed
- Create clear rules about what IT will and won't do



Recruiting Problems

Your recruiters aren't consistent about who they hire, and this is hurting your company culture. It's like having different doormen at a club who each let in different types of people. The solution is to create one standard process for selecting new employees and have the founder do a final check on important hires to make sure they're right for the company.



HR Problems

With so many employees, performance is suffering and people are starting to complain more. The fix is to:

- Get software to help train groups of new employees
- Create clear systems for managing performance
- Get insurance to protect against lawsuits
- Keep reinforcing what your company believes in



Money Problems

You're paying full price for everything and not making any money on your spare cash. It's like paying retail prices at stores when you could be getting wholesale discounts. The solution is to:

- Renegotiate prices with everyone who sells to you
- Put extra cash in accounts that earn interest
- Get specialists to handle different money tasks (especially taxes)
- Do regular internal audits to make sure no money is being wasted

THE BIG PICTURE

At Stage 8, the main challenge is that being a "jack of all trades" doesn't work anymore. You need specialists—people who are really good at specific things. Think about a hospital:

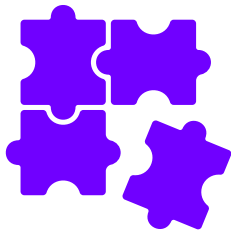
- You don't want a general doctor doing heart surgery
- You want a heart specialist
- And you want that heart specialist to focus only on hearts, not try to do everything

This is true for every part of your business:

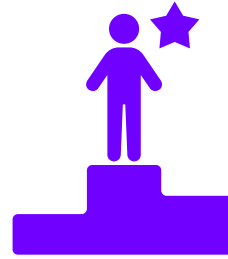
- Some salespeople should only sell certain products
- Some customer service people should only handle certain types of customers
- Some tech people should only handle certain types of software
- Some finance people should only handle certain types of money tasks

THE BOTTOM LINE

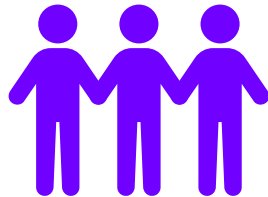
YOUR MAIN JOB AT THIS STAGE IS TO CREATE DEDICATED TEAMS OF SPECIALISTS. NO MORE “EVERYONE DOES EVERYTHING.” EACH PERSON NEEDS TO FOCUS ON WHAT THEY’RE BEST AT. THIS MEANS:



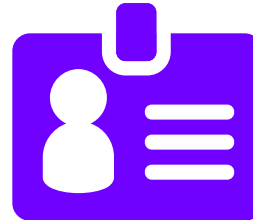
**BREAKING BIG JOBS
INTO SMALLER,
SPECIALIZED PIECES**



**FINDING PEOPLE WHO
ARE REALLY GOOD AT
THOSE SPECIFIC PIECES**



**CREATING SYSTEMS TO
HELP THESE SPECIALISTS
WORK TOGETHER**



**MAKING SURE
EVERYONE KNOWS
THEIR SPECIFIC ROLE**

This is why this stage is called “Specialize”—it’s all about getting really good at specific things instead of trying to be okay at everything. It’s like turning your company from a high school (where teachers teach multiple subjects) into a university (where professors specialize in one specific thing).

After you get the right specialists in the right roles, you can move to the next stage. This hyper specialization is what can create outsized returns to capitalize on with your next big growth bet.

DO YOU WANT TO SCALE TO THE **NEXT STEP?**

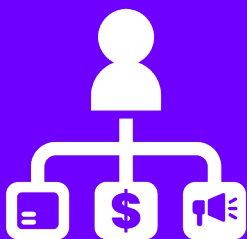


No one is good enough to know everything. You need world class talent. If you want to see our own process on how we hire A-level players, within 35 days (or less) with a 90% success rate, come to a Scaling Workshop. You can see if you qualify below.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...



STAGE 7: CATEGORIZE

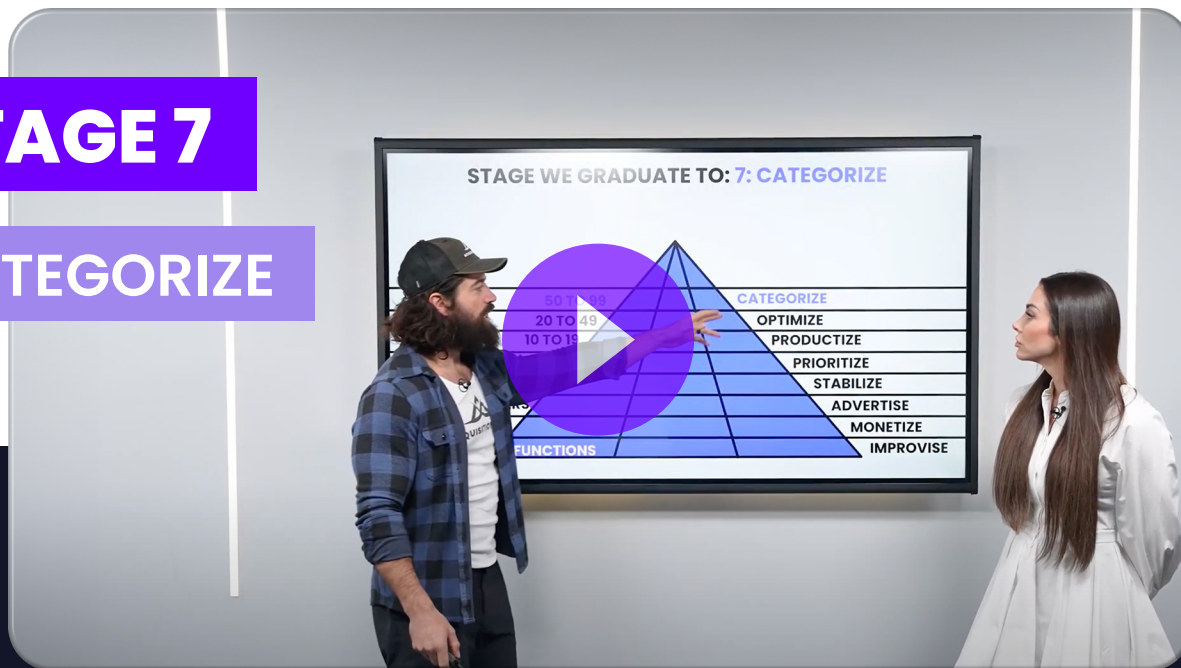
STAGE 7: CATEGORIZE

HEADCOUNT	50 to 99	
YOUR ROLE	Executive	
LEADERSHIP STRUCTURE	3 Layers: Leadership Team	
# OF COMPANIES HERE	1,200,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Product outdated. Improvements take too long to roll out.	Fix one problem at a time with focused feature specific teams.
MARKETING	Lead flow is volatile because you only have <u>one way</u> to get customers.	Fund 2nd acq channel with referral process (& track it) & segmented LT nurture by lead score. Pick most similar platform-->or new core 4.
SALES	Leads getting wasted. Not worked consistently.	Better schedule coverage. Create lead nurture checklist & kudos for top show rates.
CUSTOMER SERVICE	CS only reactive. All firefighting.	Create proactive customer journey & communication. Focus on renewals and ascensions.
INFORMATION TECH (IT)	Data, IP, Access all over the place and disorganized.	Network technology. Bring solutions to the cloud. Data host. Centrally locate hardware if onsite.
RECRUITING	Takes too long to hire good people and they get hired elsewhere. You have too many roles open to keep track of candidates and where they're at in the process.	Install Applicant Tracking System to keep track of so many open roles. Pay specialized recruiting firms to keep up.
HUMAN RESOURCES (HR)	There are too many different places for employee information and you have no data	Setup HRIS - Human Resource Information System
FINANCE	Your team starts spending your money stupidly.	QTRLY expense management. Budgets by dept. Cards w limits. Expense approval process. Add insurance coverage & get fancier projections.
Bottom line	Every system is overwhelmed. The business is disorganized.	Triage appropriately.

YOUR STAGE

STAGE 7

CATEGORIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 7**



YOUR ROLE

EXECUTIVE



HEADCOUNT

50 to 99



BOTTOM LINE

Every system is
overwhelmed.
The business is
disorganized.



GRADUATE BY

Triage appropriately.

WHEN YOU HIT “STAGE 7: CATEGORIZE”

HERE’S A SIMPLE EXPLANATION OF STAGE 7 (CATEGORIZE) WHEN A BUSINESS HAS 50–99 EMPLOYEES:

At this stage, your business has grown quite a bit – you now have between 50 and 99 employees. Only about 1.2 million companies in the US ever reach this size. You’re no longer just a manager or leader – you’re now an executive with three layers of leadership under you. The main challenge at this stage is that everything feels messy and disorganized. Let me break down what’s happening and what needs to be fixed in each area:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

Money Problems





Products Problems

Your product is starting to feel outdated, and it takes forever to make improvements. Imagine trying to fix up an old car – there are so many things that need work, but you can't fix everything at once. The solution is to make your teams focus on fixing one problem at a time. Instead of everyone trying to fix different things, you have specific teams work on specific features.



Marketing Problems

Your business is like a boat with only one engine – if that engine breaks, you're stuck. Right now you only have one main way of getting customers. This is risky because if something goes wrong with that method, your whole business could be in trouble. The fix is to add a second way to get customers, like starting a referral program where happy customers bring in new ones. You also need to get better at scoring leads (potential customers) so you know which ones are worth pursuing.



Sales Problems

Leads (potential customers) are being wasted because your sales team isn't working them consistently. It's like having a garden but forgetting to water some plants. The solution is to create better schedules so someone is always available to talk to potential customers. You also need to create a checklist for following up with leads and reward salespeople who get lots of customers to show up for meetings.



Customer Service Problems

Your customer service team is always putting out fires instead of preventing problems. It's like being a firefighter who's always rushing to emergencies instead of helping people prevent fires in the first place. The fix is to create a plan that helps prevent customer problems before they happen and focus on getting customers to renew their contracts and buy more stuff.



Tech Problems

Your company's important information, documents, and passwords are scattered everywhere – it's like having important papers spread all over your house instead of organized in filing cabinets. The solution is to move everything to the cloud (online storage) and set up a central place where all company data is stored. If you have physical computers and equipment, those need to be organized too.



Recruiting Problems

It's taking too long to hire good people, and sometimes they accept other jobs before you can hire them. Also, you have so many open positions that it's hard to keep track of all the people applying. The fix is to get special software that helps track job candidates and hire professional recruiting firms to help find people faster.



HR Problems

Employee information is scattered in too many different places – like having one drawer for medical forms, another for tax papers, and another for performance reviews. The solution is to get an HRIS (Human Resource Information System) – think of it as one big digital filing cabinet that keeps all employee information organized in one place.



Money Problems

Your team is spending money without thinking carefully about it. It's like giving everyone a credit card without any rules about how to use it. The fix is to create quarterly (every three months) budgets for each department, give people spending limits, and require approval for big purchases. You also need better insurance coverage and better financial forecasting.

THE BIG PICTURE

At Stage 7, everything feels overwhelming and disorganized. The key is to start sorting things into categories (that's why this stage is called "Categorize") and create systems to handle each category properly. It's like organizing a messy garage – first you sort everything into piles (tools, sports equipment, holiday decorations, etc.), then you create a proper storage system for each category.

THE BOTTOM LINE

YOUR MAIN JOB AT THIS STAGE IS TO SORT THROUGH THE CHAOS AND START ORGANIZING EVERYTHING. THIS MEANS ORGANIZING:



YOUR LEADS
(WHICH TO FOCUS ON)



YOUR CUSTOMERS
(WHICH ONES NEED
THE MOST ATTENTION)



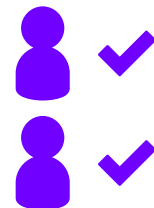
YOUR JOB APPLICANTS
(WHICH ONES
TO INTERVIEW)



YOUR MONEY
(WHAT TO SPEND
ON WHAT)



YOUR DATA
(WHERE EVERYTHING
IS STORED)



YOUR EMPLOYEES
(WHO DOES WHAT)

Only after you get everything properly sorted and organized can you move on to the next stage of growth. Think of it as laying the foundation for becoming an even bigger company. You need to segment these categories for what comes next...

THIS IS WHAT'S COMING NEXT...



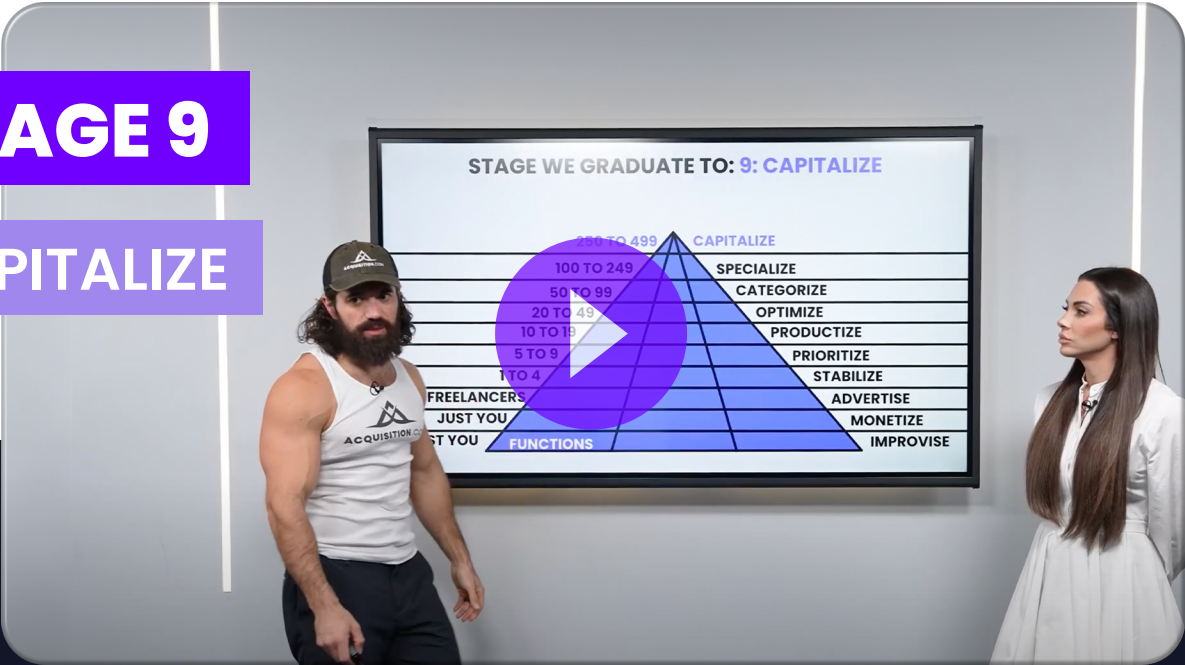
STAGE 9: CAPITALIZE

STAGE 9: CAPITALIZE

HEADCOUNT	250-500	
YOUR ROLE	Chairman	
LEADERSHIP STRUCTURE	5 Layers: CEOs	
# OF COMPANIES HERE	300,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Changes to successful products (cash cows) make them worse. But, you need new stuff to keep growing.	Buy (M&A) or build (R&D) next rising star product to add to the suite (1+ year out)
MARKETING	Lead attribution by channel becomes difficult. Platform and regulatory compliance become an issue.	Shift to brand first advertising with omnichannel approach with blended ROAS across all products. Install compliance process.
SALES	Too many different leads and products for any one type of salesperson.	Salespeople specialize in selling different products to different leads using different processes. Route leads by product/territory.
CUSTOMER SERVICE	Support for varied newer offerings is breaking due to high volume.	Triage support to specialized cs reps to improve efficiency and shorten training.
INFORMATION TECH (IT)	Old tech stack insufficient and needs update. Departments demand new & specialized solutions.	You hire more specialized tech roles for each major tech function with updated and segmented tech stack. And you may need a new enterprise level software.
RECRUITING	Best talent doesnt respond to standard recruiting efforts from anyone besides CEO/Founder.	Founder directly attracts highest level roles and sells on growth/vision. (6+ month cycle to feel comfortable)
HUMAN RESOURCES (HR)	Churn increases + you don't have who you need to grow.	Strategic workforce planning: org, capacity planning, backfill, skill gaps, role redundancy, from generalists to hyper specialization.
FINANCE	Your finances arent legit enough to get other people to give you money (raise/borrow/buy) to make a big investment M&A or R&D.	"Prep for sale": Get QoF. Banker audit. Capital structure. Hedge big investments. Optional: Raise cash for M&A or to fuel growth.
Bottom line	Not sure where the next big growth comes from.	Make a big bet on the future.

YOUR STAGE

STAGE 9
CAPITALIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 9**



YOUR ROLE

CHAIRMAN



HEADCOUNT

250 to 500



BOTTOM LINE

Not sure where
the next big growth
comes from



GRADUATE BY

Make a big bet
on the future

WHEN YOU HIT “STAGE 9: CAPITALIZE”

HERE’S A SIMPLE EXPLANATION OF STAGE 9 (CAPITALIZE) WHEN A BUSINESS HAS 250–500 EMPLOYEES:

At this stage, your company is quite large – you have between 250 and 500 employees. Only about 300,000 companies in the US ever get this big. You’re now a Chairman with five layers of management under you, including CEOs. The main challenge is that you’ve hit a plateau and need to make big bets to keep growing.

LET ME BREAK DOWN WHAT’S HAPPENING IN EACH AREA:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

Money Problems



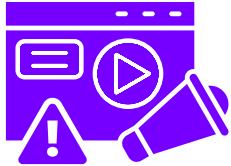


Products Problems

You're in a tricky spot – your successful products (“cash cows”) get worse when you try to change them, but you need new products to keep growing. It's like having a restaurant with a famous dish—changing it would upset regular customers, but you need new dishes to attract new customers. The solution is to either:

- Buy another company (M&A – Mergers & Acquisitions)
- Build something totally new (R&D – Research & Development)

Either way, this is a big bet that will take at least a year to pay off.



Marketing Problems

Two big problems are happening: 1) You can't tell which marketing is working anymore—it's like not knowing which fishing spot is giving you the most fish & 2) You have to be more careful about following rules and regulations. The fix is to:

- Focus on building your brand first, then selling
- Use multiple channels to reach customers
- Look at how all your marketing works together, not separately
- Create a process to make sure all marketing follows the rules



Sales Problems

Your salespeople are overwhelmed because there are too many different types of leads and products. Imagine having one waiter try to serve tables in five different restaurants—it doesn't work. The solution is to:

- Have different salespeople specialize in different products
- Have different salespeople for different types of customers
- Use different sales processes for different situations
- Sort leads by product or location



Customer Service Problems

Support for your newer products is breaking down because there's too much volume. It's like having a phone system that can't handle all the incoming calls. The fix is to:

- Have specialized customer service reps for different products
- Make training shorter and more focused
- Make the whole process more efficient



Tech Problems

Your old tech systems can't handle the load anymore, and departments want specialized solutions. The fix is to:

- Hire specialized tech people for different functions
- Update and separate your tech systems
- Maybe get new enterprise-level software (the big, expensive kind)



Recruiting Problems

The best people don't respond to normal job postings anymore—they only want to talk to the founder/CEO. The solution is to have the founder:

- Directly recruit the highest-level positions
- Sell them on the company's vision and growth
- Be patient (this can take 6+ months)



HR Problems

Employee turnover is increasing, and you don't have the right people to grow. Think of it like a sports team that keeps losing good players and can't find replacements. The fix is strategic workforce planning:

- Plan your organization's structure
- Plan for people leaving
- Fill skill gaps
- Have backups for important roles
- Turn generalists into specialists



Money Problems

Your financial records aren't good enough to convince others to give you money for big investments. The solution is to:

- Get your books audited
- Talk to investment bankers
- Set up your company's money structure properly
- Protect against big risks
- Maybe raise money for buying companies or growing faster

THE BIG PICTURE

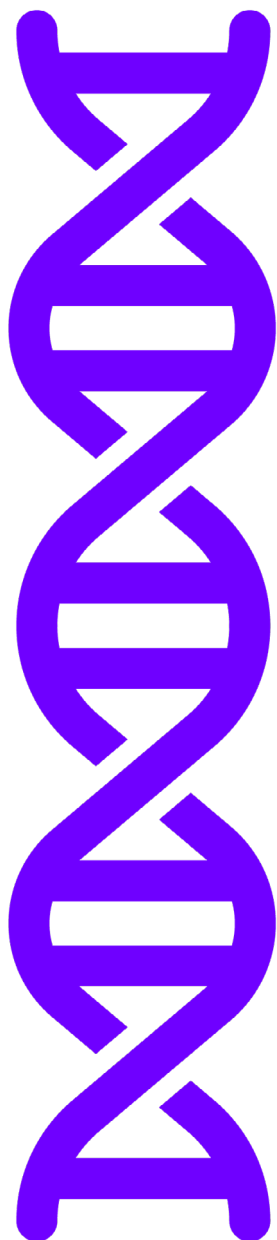
At Stage 9, you're like a ship that's reached calm waters—you're successful but not growing much anymore.

To keep growing, you need to make a big bet on the future. This could mean:

- Buying other companies
- Creating new products
- Entering new markets
- Making major investments

This is why it's called "Capitalize"—you need to take advantage of your success to make big moves.

THE KEY CHALLENGES:



Everything is getting more complex

- More products to manage
- More types of customers
- More departments to run
- More rules to follow



You need bigger solutions

- Enterprise-level software
- Specialized departments
- Professional management
- Better financial systems



You need to think bigger

- Long-term planning
- Big investments
- Major acquisitions
- New markets

THE BOTTOM LINE

YOUR MAIN JOB AT THIS STAGE IS TO MAKE A BIG BET ON THE FUTURE. YOU CAN'T JUST KEEP DOING WHAT MADE YOU SUCCESSFUL—YOU NEED TO FIND THE NEXT BIG THING. THIS MEANS:



**LOOKING FOR
COMPANIES TO BUY**



**INVESTING IN
NEW PRODUCTS**



**BUILDING NEW
CAPABILITIES**



**TAKING
CALCULATED RISKS**

Think of it like a successful restaurant owner deciding whether to:

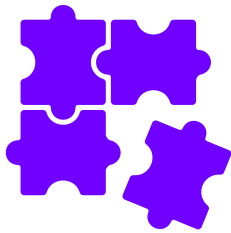
- Open new locations
- Buy other restaurants
- Create a new restaurant brand
- Start a food product line

Whatever you choose, it needs to be big enough to make a real difference to a company your size. Small bets won't move the needle anymore!

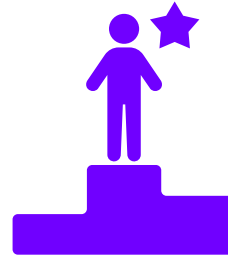
This is the last stage in our roadmap because after this, companies enter a whole different league—the world of large corporations with thousands of employees. Each company's path beyond this point becomes very unique to their industry and situation.

THE BOTTOM LINE

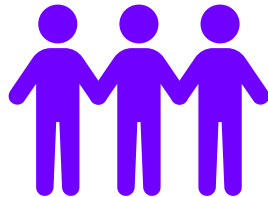
YOUR MAIN JOB AT THIS STAGE IS TO CREATE DEDICATED TEAMS OF SPECIALISTS. NO MORE “EVERYONE DOES EVERYTHING.” EACH PERSON NEEDS TO FOCUS ON WHAT THEY’RE BEST AT. THIS MEANS:



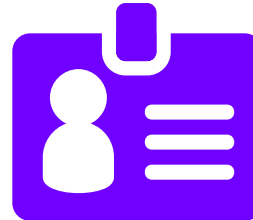
**BREAKING BIG JOBS
INTO SMALLER,
SPECIALIZED PIECES**



**FINDING PEOPLE WHO
ARE REALLY GOOD AT
THOSE SPECIFIC PIECES**



**CREATING SYSTEMS TO
HELP THESE SPECIALISTS
WORK TOGETHER**

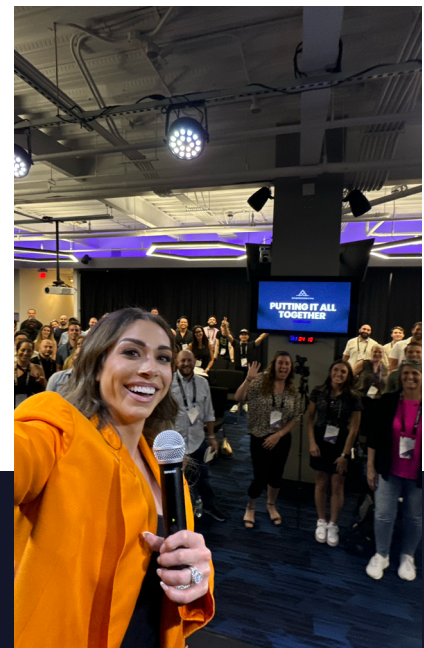
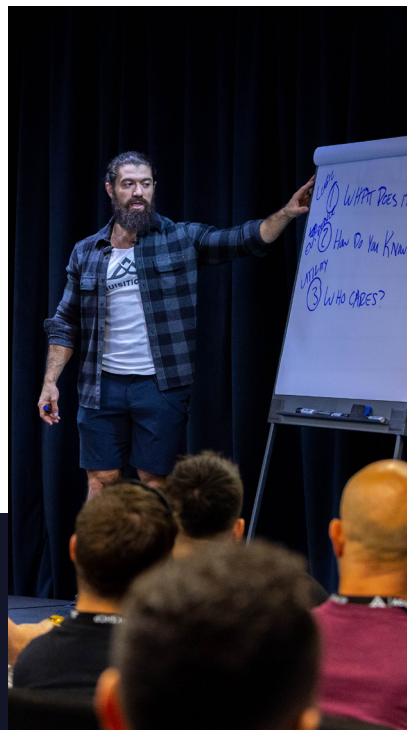
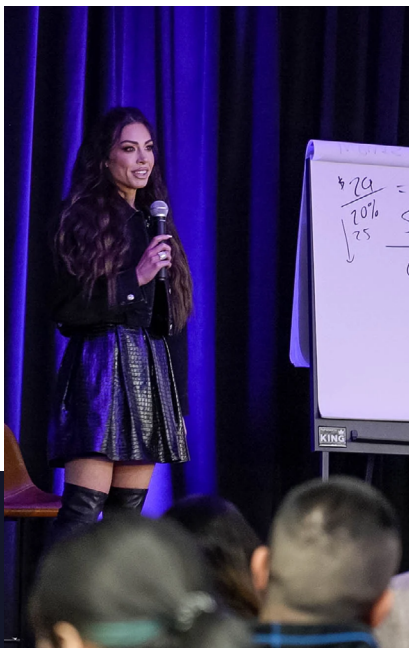


**MAKING SURE
EVERYONE KNOWS
THEIR SPECIFIC ROLE**

This is why this stage is called “Specialize”—it’s all about getting really good at specific things instead of trying to be okay at everything. It’s like turning your company from a high school (where teachers teach multiple subjects) into a university (where professors specialize in one specific thing).

After you get the right specialists in the right roles, you can move to the next stage. This hyper specialization is what can create outsized returns to capitalize on with your next big growth bet.

DO YOU WANT TO SCALE TO THE NEXT STEP?



No one is good enough to know everything. You need world class talent. If you want to see our own process on how we hire A-level players, within 35 days (or less) with a 90% success rate, come to a Scaling Workshop. You can see if you qualify below.



Check Dates

\$100M SCALING ROADMAP

► STAGE 9: CAPITALIZE ◀



A PERSONALIZED GUIDE FROM



ACQUISITION.COM

YOU ARE HERE

STAGE 9: CAPITALIZE



8: SPECIALIZE			9: CAPITALIZE		
HEADCOUNT	100 to 249		HEADCOUNT	250-500	
YOUR ROLE	President		YOUR ROLE	Chairman	
LEADERSHIP STRUCTURE	4 Layers: Executive Team		LEADERSHIP STRUCTURE	5 Layers: CEOs	
# OF COMPANIES HERE	900,000		# OF COMPANIES HERE	300,000	
CONSTRAINT			TO GRADUATE		
PRODUCT	Product too many features. Low-margin customers. Broader creative brings in lower quality leads and sales. The CAC goes up again because.	Runny	PRODUCT	Changes to successful products (cash cows) make them worse. But, you need new stuff to keep growing.	Buy (M&A) or build (R&D) next rising star product to add to the suite (1+ year out)
MARKETING		Grow too fast	MARKETING	Lead attribution by channel becomes difficult. Platform and regulatory compliance become an issue.	Shift to brand first advertising with omnichannel approach with blended ROAS across all products. Install compliance process.
SALES	Closing efficiency on premium product drops.	Route too slow	SALES	Too many different leads and products for any one type of salesperson.	Salespeople specialize in selling different products to different leads using different processes. Route leads by product/territory.
CUSTOMER SERVICE	Multiple customer journeys conflict or poorly timed with one another. Departments outgrow general software and need specific solutions. Too many internal inquiries. No inquiry process. Departmental policies.	Create a mess	CUSTOMER SERVICE	Support for varied newer offerings is breaking due to high volume.	Triage support to specialized cs reps to improve efficiency and shorten training.
INFORMATION TECH (IT)		Get special review	INFORMATION TECH (IT)	Old tech stack inefficient and needs updates. Departments demand new & specialized solutions.	You hire more specialized tech roles for each major tech function with updated and segmented tech stack. And you may need a new enterprise level software.
RECRUITING	Recruiters hold inconsistent standards and culture suffers. Wrong candidates get too far in the process.	Stagnant	RECRUITING	Best talent doesn't respond to standard recruiting efforts from anyone besides CEO/Founder.	Founder directly attracts highest level roles and sells on growth/vision. (6+ month cycle to feel comfortable)
HUMAN RESOURCES (HR)	So many new and existing employees, performance suffers. Compliance issues and complaints skyrocket.	Setup a trap	HUMAN RESOURCES (HR)	Churn increases + you don't have who you need to grow.	Strategic workforce planning: org. capacity planning, backfill, skill gaps, role redundancy, from generalists to hyper specialization.
FINANCE	You're still paying retail for everything (and getting overcharged) Cash is overextended & getting 0% returns.	No-negotiable rates for Cash	FINANCE	Your finances aren't legit enough to get other people to give you money (raise/borrow/buy) to make a big investment M&A or R&D.	"Prep for sale": Get QoF. Banker audit. Capital structure. Hedge big investments. Optional: Raise cash for M&A or to fuel growth.
Bottom line	No one is good enough to know everything	Crazy	Bottom line	Not sure where the next big growth comes from.	Make a big bet on the future.

0. IMPROVISE

1. MONETIZE

2. ADVERTISE

3. STABILIZE

4. PRIORITIZE

5. PRODUCTIZE

6. OPTIMIZE

7. CATEGORIZE

8. SPECIALIZE

9. CAPITALIZE

STAGE 9: CAPITALIZE

HEADCOUNT	250-500	
YOUR ROLE	Chairman	
LEADERSHIP STRUCTURE	5 Layers: CEOs	
# OF COMPANIES HERE	300,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Changes to successful products (cash cows) make them worse. But, you need new stuff to keep growing.	Buy (M&A) or build (R&D) next rising star product to add to the suite (1+ year out)
MARKETING	Lead attribution by channel becomes difficult. Platform and regulatory compliance become an issue.	Shift to brand first advertising with omnichannel approach with blended ROAS across all products. Install compliance process.
SALES	Too many different leads and products for any one type of salesperson.	Salespeople specialize in selling different products to different leads using different processes. Route leads by product/territory.
CUSTOMER SERVICE	Support for varied newer offerings is breaking due to high volume.	Triage support to specialized cs reps to improve efficiency and shorten training.
INFORMATION TECH (IT)	Old tech stack insufficient and needs update. Departments demand new & specialized solutions.	You hire more specialized tech roles for each major tech function with updated and segmented tech stack. And you may need a new enterprise level software.
RECRUITING	Best talent doesnt respond to standard recruiting efforts from anyone besides CEO/Founder.	Founder directly attracts highest level roles and sells on growth/vision. (6+ month cycle to feel comfortable)
HUMAN RESOURCES (HR)	Churn increases + you don't have who you need to grow.	Strategic workforce planning: org, capacity planning, backfill, skill gaps, role redundancy, from generalists to hyper specialization.
FINANCE	Your finances arent legit enough to get other people to give you money (raise/borrow/buy) to make a big investment M&A or R&D.	"Prep for sale": Get QoF. Banker audit. Capital structure. Hedge big investments. Optional: Raise cash for M&A or to fuel growth.
Bottom line	Not sure where the next big growth comes from.	Make a big bet on the future.

WATCH THIS FIRST



THIS VIDEO EXPLAINS THE ENTIRE \$100M SCALING ROADMAP. **THIS INCLUDES:**



The methodology



The differences between stages



Repeat themes to be aware of

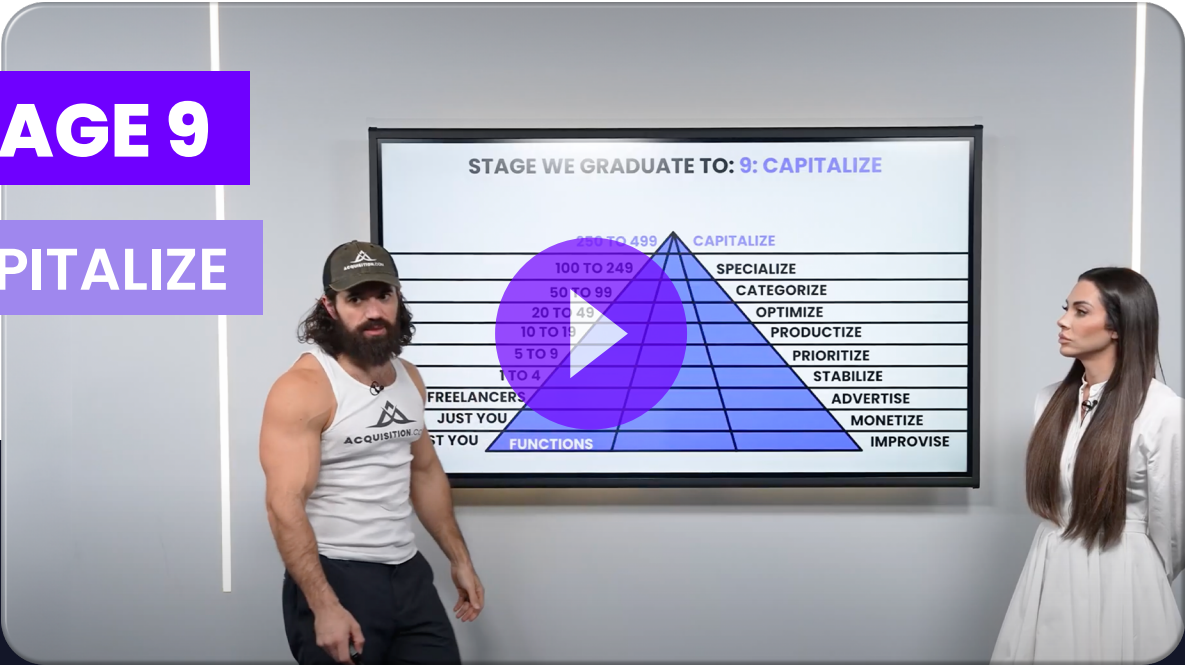


How to get the most out of your business

GOT IT? LET'S START SCALING ►►►

YOUR STAGE

STAGE 9
CAPITALIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 9**



YOUR ROLE

CHAIRMAN



HEADCOUNT

250 to 500



BOTTOM LINE

Not sure where
the next big growth
comes from



GRADUATE BY

Make a big bet
on the future

WHEN YOU HIT “STAGE 9: CAPITALIZE”

HERE’S A SIMPLE EXPLANATION OF STAGE 9 (CAPITALIZE) WHEN A BUSINESS HAS 250–500 EMPLOYEES:

At this stage, your company is quite large – you have between 250 and 500 employees. Only about 300,000 companies in the US ever get this big. You’re now a Chairman with five layers of management under you, including CEOs. The main challenge is that you’ve hit a plateau and need to make big bets to keep growing.

LET ME BREAK DOWN WHAT’S HAPPENING IN EACH AREA:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

Money Problems



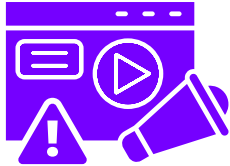


Products Problems

You're in a tricky spot – your successful products (“cash cows”) get worse when you try to change them, but you need new products to keep growing. It's like having a restaurant with a famous dish—changing it would upset regular customers, but you need new dishes to attract new customers. The solution is to either:

- Buy another company (M&A – Mergers & Acquisitions)
- Build something totally new (R&D – Research & Development)

Either way, this is a big bet that will take at least a year to pay off.



Marketing Problems

Two big problems are happening: 1) You can't tell which marketing is working anymore—it's like not knowing which fishing spot is giving you the most fish & 2) You have to be more careful about following rules and regulations. The fix is to:

- Focus on building your brand first, then selling
- Use multiple channels to reach customers
- Look at how all your marketing works together, not separately
- Create a process to make sure all marketing follows the rules



Sales Problems

Your salespeople are overwhelmed because there are too many different types of leads and products. Imagine having one waiter try to serve tables in five different restaurants—it doesn't work. The solution is to:

- Have different salespeople specialize in different products
- Have different salespeople for different types of customers
- Use different sales processes for different situations
- Sort leads by product or location



Customer Service Problems

Support for your newer products is breaking down because there's too much volume. It's like having a phone system that can't handle all the incoming calls. The fix is to:

- Have specialized customer service reps for different products
- Make training shorter and more focused
- Make the whole process more efficient



Tech Problems

Your old tech systems can't handle the load anymore, and departments want specialized solutions. The fix is to:

- Hire specialized tech people for different functions
- Update and separate your tech systems
- Maybe get new enterprise-level software (the big, expensive kind)



Recruiting Problems

The best people don't respond to normal job postings anymore—they only want to talk to the founder/CEO. The solution is to have the founder:

- Directly recruit the highest-level positions
- Sell them on the company's vision and growth
- Be patient (this can take 6+ months)



HR Problems

Employee turnover is increasing, and you don't have the right people to grow. Think of it like a sports team that keeps losing good players and can't find replacements. The fix is strategic workforce planning:

- Plan your organization's structure
- Plan for people leaving
- Fill skill gaps
- Have backups for important roles
- Turn generalists into specialists



Money Problems

Your financial records aren't good enough to convince others to give you money for big investments. The solution is to:

- Get your books audited
- Talk to investment bankers
- Set up your company's money structure properly
- Protect against big risks
- Maybe raise money for buying companies or growing faster

THE BIG PICTURE

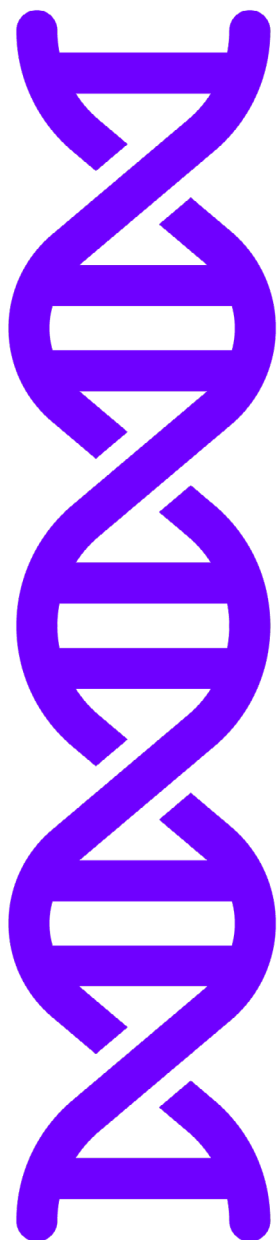
At Stage 9, you're like a ship that's reached calm waters—you're successful but not growing much anymore.

To keep growing, you need to make a big bet on the future. This could mean:

- Buying other companies
- Creating new products
- Entering new markets
- Making major investments

This is why it's called "Capitalize"—you need to take advantage of your success to make big moves.

THE KEY CHALLENGES:



Everything is getting more complex

- More products to manage
- More types of customers
- More departments to run
- More rules to follow



You need bigger solutions

- Enterprise-level software
- Specialized departments
- Professional management
- Better financial systems



You need to think bigger

- Long-term planning
- Big investments
- Major acquisitions
- New markets

THE BOTTOM LINE

YOUR MAIN JOB AT THIS STAGE IS TO MAKE A BIG BET ON THE FUTURE. YOU CAN'T JUST KEEP DOING WHAT MADE YOU SUCCESSFUL—YOU NEED TO FIND THE NEXT BIG THING. THIS MEANS:



**LOOKING FOR
COMPANIES TO BUY**



**INVESTING IN
NEW PRODUCTS**



**BUILDING NEW
CAPABILITIES**



**TAKING
CALCULATED RISKS**

Think of it like a successful restaurant owner deciding whether to:

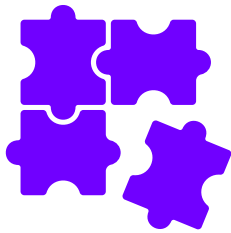
- Open new locations
- Buy other restaurants
- Create a new restaurant brand
- Start a food product line

Whatever you choose, it needs to be big enough to make a real difference to a company your size. Small bets won't move the needle anymore!

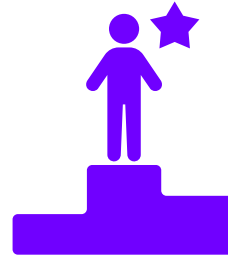
This is the last stage in our roadmap because after this, companies enter a whole different league—the world of large corporations with thousands of employees. Each company's path beyond this point becomes very unique to their industry and situation.

THE BOTTOM LINE

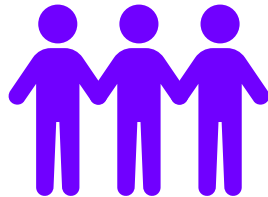
YOUR MAIN JOB AT THIS STAGE IS TO CREATE DEDICATED TEAMS OF SPECIALISTS. NO MORE “EVERYONE DOES EVERYTHING.” EACH PERSON NEEDS TO FOCUS ON WHAT THEY’RE BEST AT. THIS MEANS:



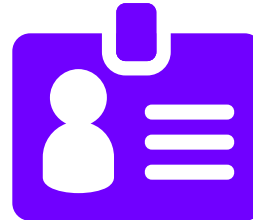
**BREAKING BIG JOBS
INTO SMALLER,
SPECIALIZED PIECES**



**FINDING PEOPLE WHO
ARE REALLY GOOD AT
THOSE SPECIFIC PIECES**



**CREATING SYSTEMS TO
HELP THESE SPECIALISTS
WORK TOGETHER**



**MAKING SURE
EVERYONE KNOWS
THEIR SPECIFIC ROLE**

This is why this stage is called “Specialize”—it’s all about getting really good at specific things instead of trying to be okay at everything. It’s like turning your company from a high school (where teachers teach multiple subjects) into a university (where professors specialize in one specific thing).

After you get the right specialists in the right roles, you can move to the next stage. This hyper specialization is what can create outsized returns to capitalize on with your next big growth bet.

DO YOU WANT TO SCALE TO THE NEXT STEP?



It's time to unlock the wealth already in your business. If you want to learn the "moves off the chess board" or go for the "get rich once" exit, let us show you how we do it. To get a front row seat, come to a Scaling Workshop. See if you qualify below.



Check Dates

THIS IS THE STAGE YOU JUST GRADUATED FROM...



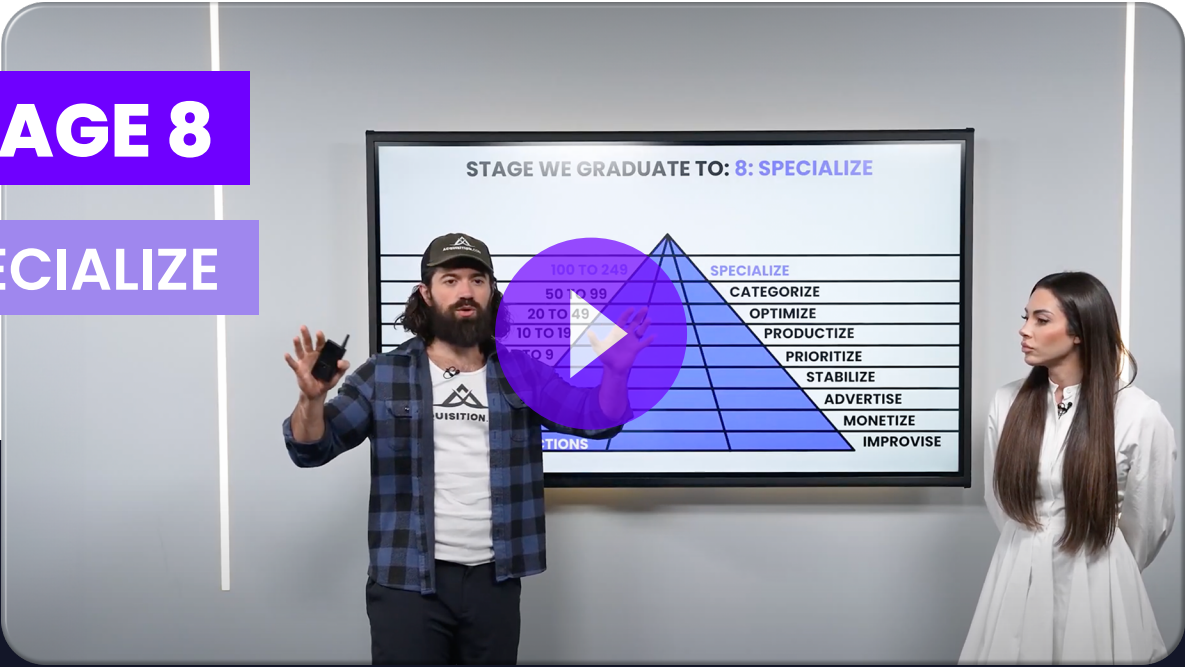
STAGE 8: SPECIALIZE

STAGE 8: SPECIALIZE

HEADCOUNT	100 to 249	
YOUR ROLE	President	
LEADERSHIP STRUCTURE	4 Layers: Executive Team	
# OF COMPANIES HERE	900,000	
	CONSTRAINT	TO GRADUATE
PRODUCT	Product too many features & overwhelms customers.	Survey. Prune. Improve thru deletion. Pruned items can become cross-sells.
MARKETING	Broader creative brings in lower quality leads and <u>dilutes the brand</u> . CAC goes up again because.	Grow brand with standardized messaging + free value + big positive brand associations.
SALES	Closing efficiency on premium product drops.	Route best leads to best closers (front end & ascensions). Automated metrics tracking.
CUSTOMER SERVICE	Multiple customer journeys conflict or poorly timed with one another.	Create proactive recommendations to cross-sell other stuff and a blended customer journey.
INFORMATION TECH (IT)	Departments outgrow general software and need specific solutions. Too many internal inquiries. No inquiry process. Departmental policies.	Get specialized stack for departments. Internal inquiry process. Staff up if needed. Create departmental policies and service level agreements.
RECRUITING	Recruiters hold inconsistent standards and culture suffers. Wrong candidates get too far in the process.	Standardized selection process for all incoming talent. Founder final check.
HUMAN RESOURCES (HR)	So many new and existing employees, performance suffers. Compliance issues and complaints skyrocket	Setup Group Onboarding (software). Documented Performance Management Systems. Insurance (EPLI). Reinforce cultural values.
FINANCE	You're still paying retail for everything (and getting overcharged.) Cash is unprotected & getting 0% returns.	Re-negotiate rates on everything. Cash to yield accts. Specialize finance roles (especially tax mitigation). Internal financial audits cadence.
Bottom line	No one is good enough to know everything.	Create dedicated people and teams for specific tasks.

YOUR STAGE

STAGE 8
SPECIALIZE



THIS VIDEO PROVIDES AN
IN-DEPTH LOOK AT THE CONSTRAINTS
& SOLUTIONS AT **STAGE 8**



YOUR ROLE

PRESIDENT



HEADCOUNT

100 to 249



BOTTOM LINE

No one is good
enough to know
everything



GRADUATE BY

Create dedicated
people and teams
for specific tasks

WHEN YOU HIT “STAGE 8: SPECIALIZE”

AT THIS STAGE, YOUR COMPANY IS GETTING PRETTY BIG—YOU HAVE BETWEEN 100 AND 249 EMPLOYEES.

Only about 900,000 companies in the US reach this size. You’re now a President with four layers of management under you. The main challenge at this stage is that no one person can be good at everything anymore – you need specialists. Let me break down what’s happening in each area:

LET ME BREAK DOWN WHAT’S HAPPENING IN EACH AREA:

Product Problems

Marketing Problems

Sales Problems

Customer Service Problems

Tech Problems

Recruiting Problems

HR Problems

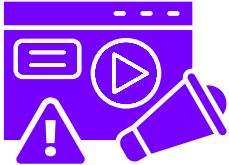
Money Problems





Products Problems

Your product has become like a Swiss Army knife with too many features – it's confusing customers. Imagine a TV remote with 100 buttons when most people only use 10 of them. The solution is to survey customers to find out what features they actually use, remove the ones they don't, and maybe turn some removed features into separate products you can sell separately. It's like turning that complicated remote into two simpler ones.



Marketing Problems

Your advertising isn't working as well as it used to, and it's getting more expensive to get customers. It's like shouting in a crowded room – nobody pays attention anymore because there's too much noise. The fix is to focus on building your brand (like Nike or Apple) instead of just selling products. This means:

- Creating a clear, simple message about who you are
- Giving away valuable free stuff to build trust
- Getting associated with other trusted brands or people



Sales Problems

Your best salespeople aren't closing as many deals as they used to. The fix is to send your best leads to your best closers and use automatic tracking to measure everything. Think of it like a restaurant sending its most experienced waiters to handle the biggest parties and most important customers.



Customer Service Problems

Different types of customers are getting conflicting information and having confusing experiences. Imagine going to a restaurant where one waiter tells you something costs \$10 and another says it's \$20. The solution is to create one clear path for customers who buy multiple products and make smart recommendations about what else they might want to buy.



Tech Problems

Different departments need different software, and everyone is asking IT for help but there's no system for handling requests. It's like having one handyman trying to fix everyone's problems in a big apartment building with no way to organize who needs what. The fix is to:

- Get specialized software for each department
- Create a system for making IT requests
- Hire more IT people if needed
- Create clear rules about what IT will and won't do



Recruiting Problems

Your recruiters aren't consistent about who they hire, and this is hurting your company culture. It's like having different doormen at a club who each let in different types of people. The solution is to create one standard process for selecting new employees and have the founder do a final check on important hires to make sure they're right for the company.



HR Problems

With so many employees, performance is suffering and people are starting to complain more. The fix is to:

- Get software to help train groups of new employees
- Create clear systems for managing performance
- Get insurance to protect against lawsuits
- Keep reinforcing what your company believes in



Money Problems

You're paying full price for everything and not making any money on your spare cash. It's like paying retail prices at stores when you could be getting wholesale discounts. The solution is to:

- Renegotiate prices with everyone who sells to you
- Put extra cash in accounts that earn interest
- Get specialists to handle different money tasks (especially taxes)
- Do regular internal audits to make sure no money is being wasted

THE BIG PICTURE

At Stage 8, the main challenge is that being a "jack of all trades" doesn't work anymore. You need specialists—people who are really good at specific things. Think about a hospital:

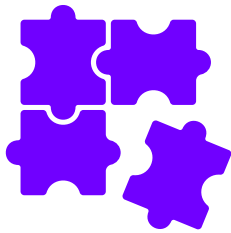
- You don't want a general doctor doing heart surgery
- You want a heart specialist
- And you want that heart specialist to focus only on hearts, not try to do everything

This is true for every part of your business:

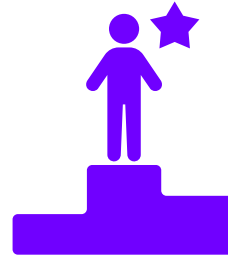
- Some salespeople should only sell certain products
- Some customer service people should only handle certain types of customers
- Some tech people should only handle certain types of software
- Some finance people should only handle certain types of money tasks

THE BOTTOM LINE

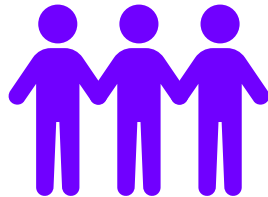
YOUR MAIN JOB AT THIS STAGE IS TO CREATE DEDICATED TEAMS OF SPECIALISTS. NO MORE “EVERYONE DOES EVERYTHING.” EACH PERSON NEEDS TO FOCUS ON WHAT THEY’RE BEST AT. THIS MEANS:



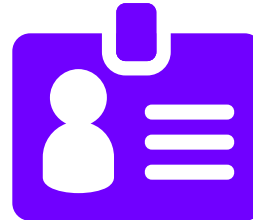
**BREAKING BIG JOBS
INTO SMALLER,
SPECIALIZED PIECES**



**FINDING PEOPLE WHO
ARE REALLY GOOD AT
THOSE SPECIFIC PIECES**



**CREATING SYSTEMS TO
HELP THESE SPECIALISTS
WORK TOGETHER**

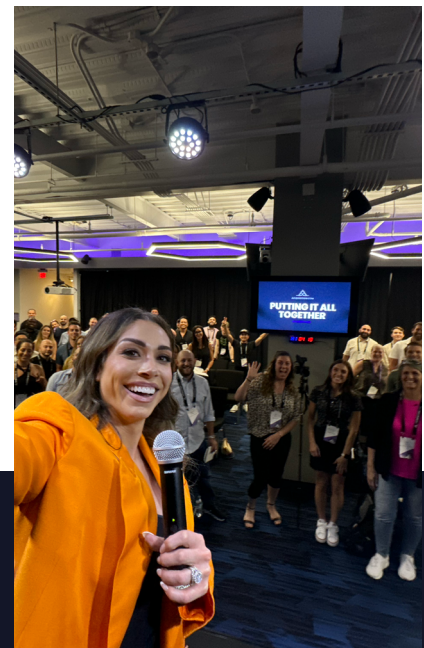
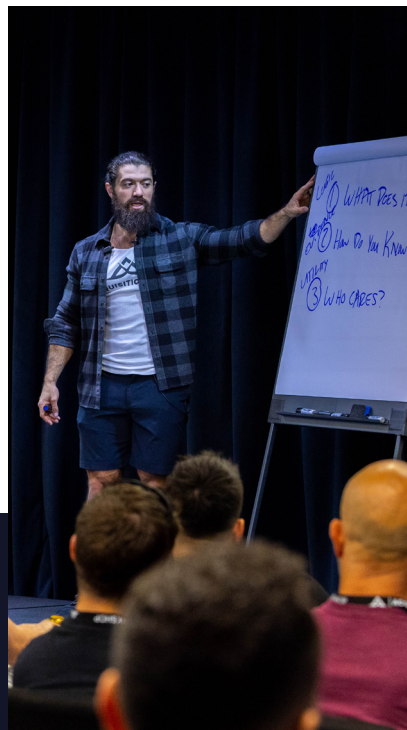
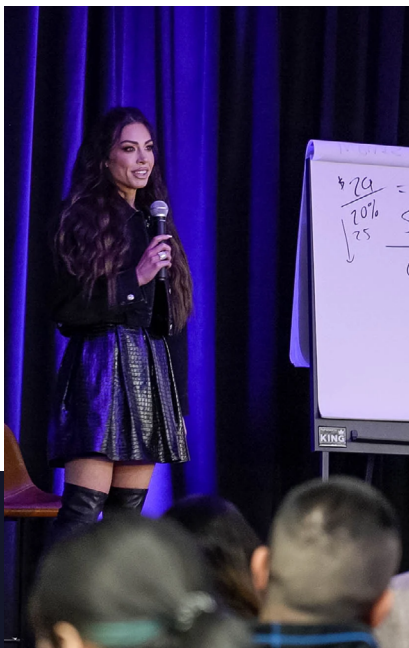


**MAKING SURE
EVERYONE KNOWS
THEIR SPECIFIC ROLE**

This is why this stage is called “Specialize”—it’s all about getting really good at specific things instead of trying to be okay at everything. It’s like turning your company from a high school (where teachers teach multiple subjects) into a university (where professors specialize in one specific thing).

After you get the right specialists in the right roles, you can move to the next stage. This hyper specialization is what can create outsized returns to capitalize on with your next big growth bet.

DO YOU WANT TO SCALE TO THE NEXT STEP?



It's time to unlock the wealth already in your business. If you want to learn the "moves off the chess board" or go for the "get rich once" exit, let us show you how we do it. To get a front row seat, come to a Scaling Workshop. See if you qualify below.

 Check Dates