Operational Capacity Planner

A practical planning worksheet for estimating whether staff, systems, vendors, facilities, data, and management routines can support the next stage of commercialization or operational growth.

1. Capacity Planning Snapshot

Organization / team		**Date**	
Product / service / program		**Prepared by**	
Current stage	Pilot / launch / growth / scale-up	**Planning horizon**	30 / 60 / 90 / 180 days
Primary growth driver	Customers / grants / contracts / partners / internal demand	**Target increase**	
Capacity decision needed	Hire / outsource / automate / phase / redesign / defer	**Decision date**	
Use this planner before committing to a larger customer volume, broader deployment, new contract, expanded pilot, manufacturing increase, field rollout, or commercialization push. The goal is to identify the true constraint before the organization scales into avoidable delays, quality issues, or customer dissatisfaction.			

2. Demand and Workload Assumptions

Demand driver	Current level	Target level	Change %	Confidence	Notes / source
Customers or users served					
Transactions / cases / projects					
Units produced / delivered					
Support requests					
Implementation / onboarding volume					
Reporting or compliance workload					
Other:					

3. Capacity Categories to Review

People	Process	Systems/Data	Partners/Vendors	Facilities/Assets
☐ Staff roles	☐ SOPs	☐ CRM / ERP / project tools	☐ Supplier capacity	☐ Space / lab / shop floor
☐ Manager bandwidth	☐ Handoffs	☐ Data quality	☐ Contract terms	☐ Equipment availability
☐ Training needs	☐ Quality checks	☐ Dashboard visibility	☐ Backup vendors	☐ Storage / inventory
☐ Hiring lead time	☐ Exception handling	☐ Automation gaps	☐ Partner SLAs	☐ Maintenance / uptime

4. Capacity Gap Matrix

Function / workstream	Current capacity	Needed capacity	Gap	Constraint type	Owner	Priority
Sales / business development						
Customer onboarding						
Operations / delivery						
Technical / engineering						
Quality / compliance						
Customer support						
Finance / billing						
Data / reporting						
Leadership / PM						

Constraint type examples: staffing, skill, process, software, data, vendor, equipment, facility, governance, budget, quality, regulatory, or customer adoption.

5. Staffing and Role Capacity Plan

Role / skill needed	Current coverage	Gap	Hire / train / outsource	Lead time	Budget notes

6. Systems, Data, and Automation Capacity Plan

System / data asset	Current limit	Scale requirement	Risk if unchanged	Upgrade / automation action	Owner / date

7. Capacity Thresholds and Triggers

Metric / indicator	Green threshold	Yellow threshold	Red threshold	Response when triggered
Backlog / queue size				
Cycle time				
On-time delivery				
Error / rework rate				
Customer response time				
Staff utilization				
Cash or budget capacity				

8. Capacity Risk Register

Risk / bottleneck	Affected area	Likelihood	Impact	Mitigation / backup plan	Owner / review date

9. 30-60-90 Day Capacity Action Plan

Timing	Action	Owner	Success measure	Dependencies
0-30 days				
0-30 days				
31-60 days				
31-60 days				
61-90 days				
61-90 days				
After 90 days				

10. Capacity Decision Summary

Recommended path	Proceed / phased expansion / resource first / redesign workflow / defer
Primary constraint	
Required investment or budget range	
Minimum conditions before scale-up	
Decision owner(s)	
Next review date	

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization.