Scaling Readiness Checklist

A practical worksheet for determining whether a commercialization, product, service, or operational initiative is ready to grow beyond early pilots, first customers, or limited deployment.

1. Initiative Snapshot

Organization / Team		**Date completed**	
Product / service / program		**Primary market / user group**	
Current stage	Idea / validation / pilot / early launch / growth	**Reviewer(s)**	
Scaling decision needed	Proceed / pause / phase / redesign / resource first	**Target scale window**	
Use this checklist before expanding into new markets, onboarding a larger customer base, hiring for growth, increasing production capacity, seeking major investment, or scaling a pilot into regular operations.			

2. Scoring Guide

Score	Status	Meaning	Suggested action
3	Ready	Evidence, ownership, resources, and operating rhythm are strong enough to scale.	Proceed or include in the scale plan.
2	Partially ready	Some evidence exists, but gaps remain in process, capacity, market evidence, or risk controls.	Address before or during a phased scale-up.
1	Not ready	Major assumptions, resource gaps, process weaknesses, or adoption risks remain unresolved.	Do not scale until the issue is corrected.

3. Market and Customer Readiness

Readiness item	3	2	1	Evidence / notes / owner
☐ Target customer or user segment is clearly defined and not overly broad.	☐	☐	☐	
☐ Evidence shows repeated demand, not just isolated interest or founder enthusiasm.	☐	☐	☐	
☐ Buyer, user, approver, and influencer roles are understood.	☐	☐	☐	
☐ Pricing expectations, willingness to pay, or funding pathways have been tested.	☐	☐	☐	
☐ Competitive alternatives and switching	☐	☐	☐	

barriers have been mapped.				
☐ Customer success criteria and adoption requirements are documented.	☐	☐	☐	

4. Product, Service, and Delivery Readiness

Readiness item	3	2	1	Evidence / notes / owner
☐ Core offering has a stable description, scope, and minimum viable feature set.	☐	☐	☐	
☐ Quality standards, acceptance criteria, or performance thresholds are defined.	☐	☐	☐	
☐ Delivery workflow can be repeated without heroics from one or two individuals.	☐	☐	☐	
☐ Support, onboarding, and troubleshooting responsibilities are assigned.	☐	☐	☐	
☐ Product/service limitations and exclusions are clear to customers and internal teams.	☐	☐	☐	
☐ Known technical, regulatory, or workflow dependencies have been identified.	☐	☐	☐	

5. Operational Capacity Readiness

Readiness item	3	2	1	Evidence / notes / owner
☐ Staffing plan can support increased volume without creating immediate bottlenecks.	☐	☐	☐	
☐ Systems, tools, vendors, facilities, or infrastructure can handle projected demand.	☐	☐	☐	
☐ Standard operating procedures exist for high-frequency or high-risk activities.	☐	☐	☐	
☐ Data capture, reporting, and handoff processes are consistent enough to monitor scale.	☐	☐	☐	
☐ Critical suppliers, partners, or consultants have capacity and backup options.	☐	☐	☐	
☐ Leadership has agreed on the pace and limits of scaling.	☐	☐	☐	

6. Financial and Funding Readiness

Readiness item	3	2	1	Evidence / notes / owner
☐ Unit economics, cost drivers, and margin assumptions are understood.	☐	☐	☐	
☐ Cash needs for scaling have been estimated with reasonable contingencies.	☐	☐	☐	
☐ Funding, revenue, grant, investor, or contract pathways align with the scale plan.	☐	☐	☐	
☐ Budget owners have been identified for key scaling activities.	☐	☐	☐	
☐ Financial risk triggers have been defined, including when to slow or pause growth.	☐	☐	☐	
☐ Revenue recognition, billing, contracting, or reimbursement considerations are understood.	☐	☐	☐	

7. Team, Governance, and Decision Readiness

Readiness item	3	2	1	Evidence / notes / owner
☐ The scale-up has an accountable owner with authority to coordinate across functions.	☐	☐	☐	
☐ Decision rights are clear for product, operations, finance, compliance, and customer issues.	☐	☐	☐	
☐ Team roles are documented for current operations and the next growth stage.	☐	☐	☐	
☐ Internal communication cadence exists for reviewing progress and resolving issues.	☐	☐	☐	
☐ Change management, training, and adoption needs have been considered.	☐	☐	☐	
☐ Leadership is aligned on what success looks like and what tradeoffs are acceptable.	☐	☐	☐	

8. Risk, Compliance, and Quality Readiness

Readiness item	3	2	1	Evidence / notes / owner
☐ Major legal, regulatory, privacy, safety, or ethical risks have been reviewed.	☐	☐	☐	
☐ Quality-control steps are built into the process before scale increases.	☐	☐	☐	
☐ Customer-facing promises, claims, and timelines are supportable.	☐	☐	☐	
☐ Data security, confidentiality, and access controls are adequate for larger use.	☐	☐	☐	
☐ Risk owners and mitigation plans exist for the highest-consequence failure modes.	☐	☐	☐	
☐ A rollback, pause, or corrective-action process is defined.	☐	☐	☐	

9. Readiness Summary

Readiness area	Avg. 3	Avg. 2	Avg. 1	Priority notes
Market and customer readiness				

Product/service delivery readiness				
Operational capacity readiness				
Financial and funding readiness				
Team, governance, and decision readiness				
Risk, compliance, and quality readiness				
Overall scaling recommendation				Proceed / phased scale / pause / redesign

10. Top Scaling Gaps and Action Plan

Gap / risk / dependency	Action needed	Owner	Target date	Priority

11. Final Decision Notes

Recommended next step	
Rationale	
Conditions before scaling	
Review date	
Approver(s)	

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