GROWTH INFRASTRUCTURE REVIEW

Executive Summary

Foundation Business Solutions • Fractional CFO / Accounting Advisory Firm • 18 Employees • Owner: Susan

Growth Infrastructure Score	Readiness Level
33/100	**High Growth Risk**

Growth Destination: Grow revenue by at least 30% and add roughly twenty new clients over the next year — while Susan spends less time involved in day-to-day decisions.

Growth Infrastructure Interpretation

A score of 33/100 means the business's current systems are not yet built to absorb the growth being pursued without added strain. This is not a judgment of Susan or her team — it reflects how much the business currently depends on informal habits and one person's involvement rather than repeatable systems.

What This Means

Demand generation looks solid — referrals have sustained the business for years, and a new Sales & Revenue Coach is working to make that more predictable. The strain shows up downstream: in how decisions get made, how consistently clients are onboarded, and how clearly the business can see its own capacity and profitability.

Biggest Growth Opportunity

A strong reputation and a proven, referral-driven client base mean the business likely doesn't need to work harder to find new clients — it needs to be ready to absorb the ones already within reach.

Biggest Infrastructure Constraint

Almost every meaningful decision — pricing, scope, staffing, client escalations — currently depends on Susan personally, and no one else could comfortably take over if she stepped away.

Top Recommendation

Start reducing decision bottlenecks and standardizing how clients are onboarded and tracked. These are the two things most likely to break first as client volume grows, and fixing them will free up the most capacity for the growth already ahead.

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Growth Infrastructure Scorecard

Each category is scored out of 20 points and rated on a five-level readiness scale: Fragile, Reactive, Developing, Established, or Growth-Ready. Most categories below fall in the Reactive-to-Fragile range — meaning the business runs today, but relies more on individual effort than on consistent, repeatable systems.

Category	Score	Readiness
Revenue & Growth	**7/20**	**Reactive**
Client Experience	**6/20**	**Reactive**
People, Leadership & Workforce Stability	**4/20**	**Fragile**
Operations & Capacity	**7/20**	**Reactive**
Financial Visibility	**9/20**	**Developing**

Revenue & Growth

Most Influential Factor: Growth relies on referrals and owner-led sales, with no demonstrated ability yet to support the client volume being pursued.

A strong referral history is a real strength, but there's no formal sales process, and Susan has said the business could not support double its client count without significant changes.

Client Experience

Most Influential Factor: Onboarding speed and client communication both depend on which consultant is handling the account.

Onboarding can take days or weeks depending on who's involved, and clients receive different levels of communication depending on their consultant — there's no consistent standard yet.

People, Leadership & Workforce Stability

Most Influential Factor: Nearly all major decisions depend on Susan, and no one else could comfortably take over.

Pricing, staffing, scope, and client-escalation decisions all route through Susan today, with no documented guidelines and no backup decision-maker.

Operations & Capacity

Most Influential Factor: There is no standardized onboarding process or central system for tracking active client work.

Client work is tracked across spreadsheets, the CRM, and individual systems, and Susan herself named onboarding and project coordination as most likely to break first under growth.

Financial Visibility

Most Influential Factor: Revenue and cash flow are tracked well, but profitability by client and operational metrics are not.

The business has good visibility into top-line numbers, but no consolidated dashboard — and can't yet confidently measure client profitability or team capacity.

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Strategic Growth Infrastructure Insights

Insight 1: Owner Dependency vs. Growth and Lifestyle Goals

Desired Outcome: Grow the business while Susan spends less time on daily decisions.

Current Reality: Pricing, scope, staffing, and client decisions all currently go through her, and no one else could take over comfortably.

Business Impact: The team has learned to check with Susan first, even on decisions they could likely handle on their own.

Growth Impact: More clients means more decisions landing on the same person — growth would increase her workload, not reduce it.

Recommended Focus Area: Define which decisions the team can make on their own.

Insight 2: Inconsistent Process vs. Growth and Client Experience

Desired Outcome: Add new clients without service quality slipping.

Current Reality: Onboarding and communication both vary depending on which consultant handles the client, and there's no central view of active work.

Business Impact: Some clients get a smoother, faster experience than others, simply based on who they're assigned to.

Growth Impact: Susan herself named onboarding and project coordination as most likely to break first as client volume rises.

Recommended Focus Area: One standard onboarding process, and one shared system for tracking active work.

Insight 3: Revenue Growth vs. Visibility

Desired Outcome: Grow revenue with confidence that it's translating into a healthier business.

Current Reality: Revenue and cash flow are easy to see; client profitability and team capacity are not tracked consistently.

Business Impact: Some clients likely take far more time than they're worth, without that ever becoming visible.

Growth Impact: The business could grow 30% while margin or workload quietly worsens, with no clear signal until something breaks.

Recommended Focus Area: Track client profitability and a few key operational numbers consistently, alongside revenue and cash flow.

Most Likely Growth Constraint: Owner Dependency

Current Condition: Susan is the approval point for nearly every meaningful decision in the business.

Future Risk: As client count grows, the volume of decisions requiring her personally grows with it, capping how much the business can realistically take on.

Why It Matters: This is the constraint most likely to limit growth first, and the one most directly at odds with Susan's own goal of stepping back.

Growth Strategy Alignment

The business's current infrastructure can support modest, steady growth, but it wasn't built for the pace Susan is targeting. If new clients arrive faster than decision-making, onboarding, and tracking are strengthened, the strain will show up first as onboarding delays, an inconsistent client experience, and a heavier decision load on Susan — the opposite of the independence she's working toward. Growth efforts, like the new Sales & Revenue Coach, and infrastructure improvements should move together: as new business starts coming in, the decision-rights and standardization work below should already be underway, so the business is ready to absorb clients as they arrive rather than catching up after the fact.

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Top 3 Priorities

Priority 1: Owner Dependency in Decision-Making and Sales

Why It Matters: Nearly every significant decision — pricing, scope, staffing, hiring, client escalations — currently depends on Susan, and no one could comfortably take over if she stepped away. This directly conflicts with her goal of less day-to-day involvement, and it will intensify as client volume grows.

What Good Looks Like: Routine client, pricing, and staffing decisions can be made by consultants without Susan's direct involvement, guided by clear, documented decision guidelines.

Recommended Actions

1. Draft a one-page decision-rights chart showing which decisions consultants can make on their own versus which need Susan, starting with the lowest-risk categories.
2. Formally delegate two or three recurring decision types — such as routine pricing exceptions within a defined range — to specific consultants for a trial period.
3. Document the reasoning behind common decisions Susan currently makes from experience, so judgment — not just steps — is available to the team.

Priority 2: Lack of Standardized Onboarding, Project Tracking, and Training

Why It Matters: Onboarding, project tracking, communication, and training are all handled differently depending on which consultant is involved. Susan named this, unprompted, as both the area most likely to break first under growth and the one problem she'd most want solved.

What Good Looks Like: Every client gets the same onboarding steps and communication cadence, and all active work is visible in one shared location.

Recommended Actions

1. Combine the best elements of existing consultant onboarding checklists into one standard checklist used for every new client.
2. Choose one existing system (spreadsheet or CRM) as the single shared location for tracking all active client work, responsibilities, status, and deadlines.
3. Set one minimum communication standard — for example, a check-in every two weeks — that applies to every client, regardless of consultant.

Priority 3: Limited Financial and Operational Visibility

Why It Matters: Revenue and cash flow are tracked and used, but client-level profitability and operational metrics are not. Without them, growth-related strain wouldn't be visible until a deadline is missed or a client turns out to be unprofitable.

What Good Looks Like: Leadership can see, on a regular basis, which clients are profitable, how much capacity the team has, and how onboarding and delivery are performing.

Recommended Actions

1. Begin tracking consultant time per client on a weekly basis so effort can be compared consistently to revenue.
2. Select three or four operational metrics — such as onboarding time or open projects per consultant — to track and review monthly.
3. Combine revenue and cash flow reporting with these new metrics into one recurring report, reviewed monthly.

Recommended Action Steps

Quick Wins

Immediate, low-effort steps that reduce strain right away.

- Draft a one-page decision-rights chart showing which decisions consultants can make on their own versus which need Susan.
- Combine the best elements of existing onboarding checklists into one standard checklist used for every new client.
- Set one minimum client communication standard — such as a check-in every two weeks — that applies across all consultants.

Foundational Improvements

Steps that build consistency, accountability, and infrastructure for the long run.

- Document the reasoning behind common decisions Susan makes from experience, so judgment is available to the team.
- Choose one existing system (spreadsheet or CRM) as the single shared location for tracking all active client work.
- Begin tracking consultant time per client on a weekly basis to compare effort against revenue.
- Select three or four operational metrics — such as onboarding time or open projects per consultant — to track and review monthly.

Growth-Enabling Actions

Steps that increase capacity and reduce owner dependency so the business can support future demand.

- Formally delegate two or three recurring decision types — such as routine pricing exceptions within a defined range — to specific consultants for a trial period.
- Combine revenue and cash flow reporting with the new operational and profitability metrics into one recurring report, reviewed monthly, so growth-related strain is visible early.