

Preparation Packet for Day 3: Leadership Strategies for Scaling

PART 1: DESCRIBE YOUR SCALING PLAN

Instructions: Complete each step based on your current vision for scaling. Prepare to share in class.

Step 1 –Where you are today.

What we sell, to whom: _____

Roughly how big (revenue, customers, locations): _____

How many people (and how many have been with you since Day 1): _____

Step 2 – Where you are trying to be.

“ ____ months from now, this business will be _____
_____.”

We will get there by (check one or two that matter most):

- ☐ More of the same customers
- ☐ New geographies
- ☐ New products or lines
- ☐ New channel (retail, wholesale, online, licensing)
- ☐ Franchise or replicate
- ☐ Raise outside capital
- ☐ Hire senior people / build a leadership layer
- ☐ Convert what's in my head into a structure/system
- ☐ Acquire or partner
- ☐ Other: _____

Step 3 – State your next move.

“In the next ____ months, I will scale by _____.”

What I'd have to stop doing personally: _____

What I'd have to start doing differently: _____

What I'd have to hand to someone else: _____

What else: _____

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PART 2: REFLECT ON YOUR LEADERSHIP IDENTITY

Instructions: Fill out the bottom three circles first and then write your purpose statement last. Prepare to share in class.

What do you hope to achieve and be remembered for as a leader?

“My leadership purpose is to...

_____.”

What motivates you to lead?
Rank top 5 by most important (1) to least important (5)

___ Money/compensation	___ Personal growth
___ Power/control	___ Helping others
___ Prestige/status	___ Finding meaning
___ Beating the competition	___ Being true to you
___ Public recognition	___ Making a difference

What are your most distinctive leadership strengths?
(Check up to 5)

- ___ Displaying honesty, & integrity
- ___ Exhibiting technical & professional expertise
- ___ Problem solving & analyzing issues
- ___ Getting results & establishing stretch goals
- ___ Developing strategic perspective
- ___ Championing change & innovation
- ___ Communicating powerfully & broadly
- ___ Inspiring and motivating others
- ___ Building relationships (both internal & external)
- ___ Developing others & fostering teamwork

What core values guide how you behave and make life and/or business decisions?
(List up to 5)

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PART 3: ASSESS YOUR ENTREPRENEURIAL IDENTITY

Instructions: For each statement, indicate how much you agree or disagree using the following scale (1 = *strongly disagree*, 2 = *disagree*, 3 = *neutral*, 4 = *agree*, 5 = *strongly agree*). Then sum up the sub-scores. Prepare to share in class.

		Score (1-5)
1	Achieving high financial returns is my primary motivation for running my business.	
2	I focus on financial metrics and profitability when making business decisions.	
3	My main goal is to maximize the valuation of my company for a lucrative exit.	
4	I prefer pursuing business strategies that offer quick financial gains, even if they involve short-term risks.	
5	I regularly seek out high-value investors and partnerships that can significantly increase my company's financial worth.	
6	Maintaining control over my company's direction and decisions is more important to me than financial rewards.	
7	Building a lasting legacy and making a meaningful impact in my industry or community is my top priority.	
8	I prefer to retain ownership and decision-making power, even if it means limiting growth opportunities or financial gains.	
9	Creating a strong company culture and aligning the business with my personal values is crucial to me, even over financial success.	
10	I am more focused on the long-term vision of the company and its impact rather than immediate financial returns.	

Sum of items 1-5: _____

Sum of items 6-10: _____