

FREE CHECKLIST

# Scaling Readiness Checklist

Seven breaking points between 10 and 200 partners. Tick what is already true today.

## How to use it

Run it with your team before the next group of partners joins. Tick a box only if it is true for every partner, not just the ones you know best. The first section with two or more empty boxes is where to start.

### 1. Status without chasing

usually from about 15 partners

- ☐ Partners record progress where they do the work, not in replies to an e-mail
- ☐ We can see every partner's current position without asking anyone
- ☐ "Progress" is defined in observable terms that every partner knows

### 2. One version of the framework

from about 25 partners

- ☐ The framework has one owner and one current version
- ☐ Changes are logged, dated and reach every partner at the same time
- ☐ Partners who joined in different years work to the same definitions

### 3. Onboarding that does not depend on one person

from about 40 partners

- ☐ A written welcome pack explains the program and the first three steps
- ☐ A new partner can see what its next step asks without a call
- ☐ At least two people on our team can onboard a partner

### 4. Evidence in one place

from about 60 partners

- ☐ Each piece of evidence is requested once, with a due date
- ☐ Evidence is stored with the requirement it proves, not in personal inboxes
- ☐ We can list what is missing across all partners in minutes

### 5. Reporting from data, not from a deadline

from about 90 partners

- ☐ A short list of KPIs is defined before the year starts, the same for every partner
- ☐ KPI values are collected during the year, and their history is kept
- ☐ The annual report can be drafted in days, not weeks

### 6. Clear expectations, in the partner's language

from about 120 partners

- ☐ Each stage says what is expected in plain, observable terms
- ☐ Stage descriptions and templates exist in our partners' working languages
- ☐ Partners can see their own position and next step at any time

### 7. Permissions and data protection

from about 160 partners

- ☐ Roles define who on our team sees what, and who can change it
- ☐ A partner can only ever see its own data
- ☐ We know where partner files are stored, and access ends when people leave

### 8. Coordinator load (fill in with your own numbers)

Partners (P)

Requests per partner per week (r)

Minutes per request (m)

Hours a week the team has for partner requests (H)

Utilization  $u = P \times r \times m \div (60 \times H)$

Time to get through, as a multiple of the work =  $1 \div (1 - u)$

Example with assumed numbers: P = 50 partners, r = 1 request a week, m = 20 minutes and H = 20 hours give u = 0.83.

The average request then takes about  $1 \div (1 - 0.83) \approx 6$  times its own handling time to get through.

At 0.8, a request already takes five times its own handling time to get through. Reduce the requests first, then the time each one takes; add people last.