



How to Build Your Business Beyond Yourself

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The Stages of Small Business Success

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5 Functions of a Business

1. **Marketing**
2. **Sales**
3. **Leadership/Team**
4. **Measurement and Money**
5. **Fulfillment**

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A Healthy Stage 1 Business

1. Markets both online and offline in at least 2 different ways.
2. Has a complete talk track on their expertise and their core product.
3. Has a written, stated vision for the company.
4. Is an entity with a working revenue model.
5. Has a clearly defined fulfillment process.

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A Healthy Stage 2 Business

1. Has a marketing budget/plan.
2. Has a teachable system of selling, and more than one product offering.
3. Has clearly defined roles within the business.
4. Is an entity with a working revenue model and current profit/loss statements.
5. Has a customer services program.

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A Healthy Stage 3 Business

1. Has a marketing budget/plan of at least 1K per month.
2. Has a scalable system of selling, and a clearly defined product cycle.
3. Has defined criteria for hiring, training and firing employees.
4. Is an entity with a revenue model, that has a forecasted budget, including growth projections.
5. Has a customer services program with dedicated resources.

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A Healthy Stage 4 Business

1. Has a marketing budget of at least 5K per month.
2. Has a sales team able to quickly roll out new products and has a larger geographical footprint.
3. Has a defined mission and vision that is aligned with stated company values and a teachable leadership model in place.
4. Has an accounting team and is exploring the next level of expansion. (franchise, acquisition, etc.)
5. Has scalable system of customer service positioned for continued expansion.

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Stage of Business	1 Customer Acquisition	2 Customer Loyalty	3 Scalability	4 Endurance
Annual Sales	\$0-100k	\$150-250k	\$500-700K	\$1-3M
# of Employees	1	2-5	8-12	12-15
Leadership Team	Founder(s)	2-3 Partners	2-3 Defined Departments	President and Departments
Capital Raised	Sweat	CC's and Personal Bank Acct	LOC	\$200-300k and F&F
Timeline	2 Years	2 Years	2 Years	1 Year

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