



THE **7** LEVELS OF SCALE Checklist

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Our Core PURPOSE

**Help leaders build companies
that are more profitable and
more fulfilling to run, while
avoiding burnout.**



Ready To Level Up?

LEVEL OF SCALE 1

- Generate (at least) 10 sales**
- Generate (at least) 10 Promoters (NPS = 9+)**
- Make your “Model 10” list (High-LTV + High-Advocacy)**

Ready To Level Up?

(Once you have checked all the boxes you're ready to move onto **Level 3.**)

LEVEL OF SCALE 2

- Map your Growth Engine
- Build a metrics scorecard that tracks the performance of each stage
- Establish a 90-day optimization cadence with your team
- Have ONE Growth Engine generating at least \$10K/mo at least 3 months in a row (1:10:3)

Ready To Level Up?

(Once you have checked all the boxes you're ready to move onto **Level 4.**)

LEVEL OF SCALE **3**

- Map a visual “flowchart” of how the company creates value (Sale + Serve)
- Document checklists and SOPs for the 5 - 7 most critical processes and activities
- Assign clear roles and accountability for all critical tasks and activities
- Build a Company Scorecard (3 North Star + 3 Metrics Per Team)
- Define your company's Meeting Rhythm
- Define your goals, purpose, and values
- Install your upgraded Operating System

Ready To Level Up?

(Once you have checked all the boxes you're ready to move onto **Level 5.**)

LEVEL OF SCALE 4

- Pay Yourself FIRST** (at least enough to cover personal expenses plus 15%)
- Establish expense ratios and budgets**
- Build a 3 - 6 month Emergency Fund** (plus 1 month in Operating Account)
- Setup your cashflow waterfall accounts and institute a monthly cash "sweep"**

Ready To Level Up?

(Once you have checked all the boxes you're ready to move onto **Level 6.**)

LEVEL OF SCALE **5**

- Identify a worthy mentor (or mentorship program)
- Find 3 - 5 peers who could serve on your Advisory Board
- Attend an Advisory Board meeting (yours or a peer's)
- Join a high-quality mastermind and shortcut all of the above

Ready To Level Up?

(Once you have checked all the boxes you're ready to move onto **Level 7.**)

LEVEL OF SCALE **6**

- Position yourself as an investor**
- Assemble your "Deal Team"**
- Determine acquisition criteria**
- Identify at least five (5) potential acquisition targets (asset or company)**
- Complete target owner outreach**
- Close and integrate your first expansion acquisition**

Ready To Level Up?

(Once you have checked all the boxes, it's time to start building "legacy wealth" ...)

LEVEL OF SCALE

7

- Hit your "Number"
- Claim your "Everest Reward"
(CELEBRATE!)
- Plan your "Ideal Exit"
- Reset and define your "Second Mountain"
- Share your story (with us!)



Half a Bubble Out
Leadership & Business Development

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