BUSINESS GROWTH READINESS CHECKLIST

Is Your Business Ready to Scale?

About Countersteer

What Countersteer is. Most owners drive their business by looking in the rearview mirror. Revenue, profit and the P&L tell you what already happened, and by the time the number lands on your desk, the work that produced it is long finished. Countersteer moves you to the steering wheel: the few activities your team can change this week that move those numbers. That is the Countersteer Method, and every Countersteer book, seminar and program teaches it.

Why the name. When your car starts to slide, you turn the steering wheel the opposite way. That's a countersteer: a small, deliberate turn of the wheel in the direction that feels wrong, and it's how a driver gets back in control. It isn't instinct. It's a control input you have to learn. Running a business is the same. When things go sideways, owners grip harder: more hours, more trucks, more ads. The fix is usually a small, counterintuitive move on the right number. You don't steer a business by gripping harder. You steer it by learning the right input.

How I help a business. First, we score all twelve functions, from marketing to quality, and find the lowest one. That's where the money is leaking. Then we trace it: the result, the financial driver underneath it and the activity your team can actually change. One number. One Accountable Owner, by name. And a Tuesday to check it. Then we check it every Tuesday, because most owners don't need more advice. They need the work to get done.

What I believe. Knowledge without execution creates no value. Community without accountability creates no progress. Fix the profit leaks before you add horsepower: operations before growth. Measure it or it didn't happen. And my job is to put business owners back in the driver's seat.

— *Jon Colen, Chief Executive Officer, Countersteer Works*

Why this matters

Growth doesn't fix a business. It turns up the volume on whatever is already there. A shaky process at $2 million is a broken one at $3 million. This checklist finds the weak spots **before more customers, more locations or more people find them for you**.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

How to Use This Checklist

Answer for how the business runs today, not how you plan to run it. For each item, mark one box:

- ☐ **Ready** — We do this every week, and it doesn't depend on one person.
- ☐ **Needs Attention** — We do it sometimes, or only when someone remembers.
- ☐ **Critical Gap** — If we grew tomorrow, this is what breaks.

Then pick the gaps that cost you the most money and fix those first. Not all of them. The top five.

1. STRATEGY & BUSINESS MODEL

If you can't write down where the next dollar of growth comes from, you're guessing.

Your Countersteer: Infrastructure. The one-page plan, reviewed every month. A plan nobody opens is decoration.

Readiness Question	Ready	Needs Attention	Critical Gap
Can we write our growth plan on one page, in 45 minutes?	☐	☐	☐
Can we name our best customer in one sentence a stranger could repeat?	☐	☐	☐
Can we say why customers pick us over the next company in line?	☐	☐	☐
Does each sale make money after every cost, or are we buying revenue?	☐	☐	☐
Do we know which customers, products and markets the next dollar of growth comes from?	☐	☐	☐
Have real customers asked for more of what we plan to grow?	☐	☐	☐
Does every growth goal have a number, a date and an Accountable Owner?	☐	☐	☐
Is the 12–36 month plan written down and reviewed every month?	☐	☐	☐

Strategy Red Flags

☐ We're growing because we can, not because we chose to.
☐ We chase every opportunity instead of picking the best three.
☐ We're expanding because a competitor did.
☐ Nobody has asked us for more of what we plan to sell.
☐ We don't know which products, customers or markets actually make money.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

The strategy gap we fix first:

2. FINANCIAL READINESS

Profit lies. Cash doesn't. Growth eats cash before it makes any, so know your numbers before you step on the gas.
Your Countersteer: Accounting. Days from job complete to invoice, checked every week.

Readiness Question	Ready	Needs Attention	Critical Gap
Do we get accurate financial statements within 15 days of month end?	☐	☐	☐
Do we know our gross and net margin by product, service or customer type?	☐	☐	☐
Do we look at cash every week, not just profit every month?	☐	☐	☐
Do we know the monthly revenue it takes to break even?	☐	☐	☐
Do we know what it costs to win one new customer?	☐	☐	☐
Do we know what a customer is worth over the whole relationship?	☐	☐	☐
Can we carry 90 days of bigger payroll and bigger receivables?	☐	☐	☐
Have we built a month-by-month cash forecast for the growth plan?	☐	☐	☐
Have we set aside a cushion for the costs we haven't thought of?	☐	☐	☐
Do we know exactly how we'll pay for the expansion?	☐	☐	☐

Financial Red Flags

☐ Revenue is up, and the bank balance is down.
☐ We can't say what our real margins are.
☐ We scramble to make payroll more than once a year.
☐ One customer could sink us if they left.
☐ Growth requires more working capital than we currently have.

The cash gap we fix first:

What we'll do, and the Accountable Owner:

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

3. CUSTOMER READINESS

More customers you can't keep is the most expensive growth there is. Find out why they stay and why they leave.

Your Countersteer: Marketing. Campaigns aimed at one defined customer, and leads that fit what you actually sell.

Readiness Question	Ready	Needs Attention	Critical Gap
Can we describe our ideal customer in one sentence?	☐	☐	☐
Do customers get what we promised, every time, no matter who's on shift?	☐	☐	☐
Do we measure customer satisfaction at least once a quarter?	☐	☐	☐
Do we know the top three reasons customers leave?	☐	☐	☐
Is someone accountable for keeping the customers we already have?	☐	☐	☐
Do new customers come from a process, not luck?	☐	☐	☐
Could customer service handle 50% more calls next month?	☐	☐	☐
Do we ask for feedback on a schedule, and act on it?	☐	☐	☐
Would most customers recommend us without being asked?	☐	☐	☐

Customer Red Flags

☐ Complaints are going up.
☐ Fewer customers are coming back.
☐ Customer service runs through the owner.
☐ We don't know why customers pick a competitor.
☐ We are acquiring customers faster than we can serve them.

The customer gap we fix first:

---

4. SALES & MARKETING READINESS

Today's revenue is the call you made a month ago. Watch only revenue and you find the problem a month late.

Your Countersteer: Sales. Prospecting calls and quotes sent each week.

Readiness Question	Ready	Needs Attention	Critical Gap
Do we have a written sales process anyone on the team could follow?	☐	☐	☐
Does every stage of the sale have an Accountable Owner?	☐	☐	☐
Do we track every lead from first contact to closed deal?	☐	☐	☐
Do we know our close rate, by salesperson?	☐	☐	☐

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

Readiness Question	Ready	Needs Attention	Critical Gap
Do we know which marketing channels produce customers, not just leads?	☐	☐	☐
Does a new customer pay back what it cost to win them within a year?	☐	☐	☐
Do we have enough qualified leads to hit the growth target?	☐	☐	☐
Could a stranger repeat what we do in one sentence?	☐	☐	☐
Could marketing double its output without doubling its cost?	☐	☐	☐

Sales & Marketing Red Flags

☐ Sales depend on one person.
☐ Sales forecasts are guesses.
☐ Marketing is busy, but nobody can show what it produced.
☐ It costs more every quarter to win a customer.
☐ We can't predict next month's sales.

The sales gap we fix first:

---

5. OPERATIONS & PROCESS READINESS

Find the step everything else waits on. More volume through a bottleneck just makes a longer line.

Your Countersteer: Operations. Run hours at the bottleneck, and defects caught during the work.

Readiness Question	Ready	Needs Attention	Critical Gap
Are our core processes written down, one page each?	☐	☐	☐
Does every process have an Accountable Owner?	☐	☐	☐
Could operations handle 25–50% more volume without overtime becoming normal?	☐	☐	☐
Do we check quality during the work, not just at the end?	☐	☐	☐
Are suppliers reliable enough to grow on?	☐	☐	☐
Do we have the production or service capacity the plan needs?	☐	☐	☐
Do we know how much inventory we carry, and why?	☐	☐	☐
Do we know our bottleneck, and does it ever sit idle?	☐	☐	☐
Could the business run for two weeks without the owner deciding everything?	☐	☐	☐

Operations Red Flags

☐ People work around broken processes every day.
☐ Key knowledge lives in one person's head.
☐ Quality slips when we get busy.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

☐ Jobs and projects run late more often than not.
☐ Every decision goes through the owner.
Our bottleneck:

What we'll do, and the Accountable Owner:

6. PEOPLE & LEADERSHIP READINESS

People rarely quit on the day they give notice. They quit weeks earlier, in a conversation that never happened.
Your Countersteer: Human Capital. One-on-ones held and stay interviews completed.

Readiness Question	Ready	Needs Attention	Critical Gap
Is the right person in every key role today?	☐	☐	☐
Does every role have a written job description and a scorecard?	☐	☐	☐
Have our managers led a bigger team before, or been trained to?	☐	☐	☐
Do we know who we need to hire in the next 12 months?	☐	☐	☐
Does every new hire get the same onboarding?	☐	☐	☐
Does every role get real training, not on-the-job guessing?	☐	☐	☐
Does everyone know the number they're accountable for?	☐	☐	☐
Do leaders hand off work and leave it handed off?	☐	☐	☐
Is there a backup for every key role?	☐	☐	☐
Would our best people tell a friend to work here?	☐	☐	☐

People Red Flags

☐ Our best people are overloaded.
☐ We hire when someone quits, not before.
☐ We promote good workers into management and hope.
☐ The founder is the bottleneck.
☐ Turnover is going up.
The people gap we fix first:

7. TECHNOLOGY & DATA READINESS

A report is only as honest as the data that fed it. Trust the number only after you've traced it back.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

Your Countersteer: Information Systems. Data checked at entry, access matched to role, reports reconciled every week.

Readiness Question	Ready	Needs Attention	Critical Gap
Do our systems share data, or do we retype it?	☐	☐	☐
Is customer data clean, with one record per customer?	☐	☐	☐
Do we track customers in a CRM, not in inboxes and memory?	☐	☐	☐
Have we automated the work we repeat every day?	☐	☐	☐
Would our systems hold up at 50% more volume?	☐	☐	☐
Do leaders get the numbers they need every week, on time?	☐	☐	☐
Are critical systems backed up, and have we tested a restore?	☐	☐	☐
Does each person have access to only what their job requires?	☐	☐	☐
Can a new hire learn our systems in the first week?	☐	☐	☐

Technology Red Flags

☐ We run the business on spreadsheets and workarounds.
☐ Our data lives in systems that don't talk to each other.
☐ We can't see what's happening in the business this week.
☐ Our systems slow down or fail when we get busy.
☐ People spend hours a week retyping and copying.

The systems gap we fix first:

---

8. LEGAL, COMPLIANCE & RISK

Zero incidents isn't safe. Zero is silent. Know your risks before growth multiplies them.

Your Countersteer: Safety. Near-misses reported and reviewed, and corrective actions closed on time.

Readiness Question	Ready	Needs Attention	Critical Gap
Are licenses and registrations current, with renewal dates on a calendar?	☐	☐	☐
Are contracts written, signed and easy to find?	☐	☐	☐
Have we protected our names, methods and other intellectual property?	☐	☐	☐
Has our insurance been reviewed against the size we plan to be?	☐	☐	☐
Have our employment policies been reviewed by a professional?	☐	☐	☐
Do we know which regulations apply to us, and who tracks them?	☐	☐	☐
Do we handle customer and employee data the way the law requires?	☐	☐	☐
Have we listed our top five business risks?	☐	☐	☐

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

Readiness Question	Ready	Needs Attention	Critical Gap
Do we have a plan for losing a key person, system or supplier?	☐	☐	☐

Risk Red Flags

☐ Important agreements are handshakes.
☐ Nobody is accountable for compliance.
☐ We've never listed our biggest risks.
☐ Insurance hasn't been reviewed in over a year.

The risk we deal with first:

Note: Legal, tax, employment, regulatory and insurance rules vary by business and location. Those calls belong to a professional, not to me and not to you.

---

9. SUPPLIER & PARTNER READINESS

Margin doesn't always leak out the sales side. Sometimes it leaves through the invoice you paid without looking.

Your Countersteer: Purchasing. Invoices matched to the PO and the receipt before payment.

Readiness Question	Ready	Needs Attention	Critical Gap
Can our key suppliers handle 50% more volume?	☐	☐	☐
Do we have a backup source for every critical input?	☐	☐	☐
Are supplier prices and terms in writing?	☐	☐	☐
Do we match every invoice to the PO and the receipt before we pay?	☐	☐	☐
Do deliveries and distribution run on time?	☐	☐	☐
Have our critical partners delivered when it counted?	☐	☐	☐

Our biggest supplier/partner risk:

Our backup plan, and the Accountable Owner:

---

10. LEADERSHIP & DECISION-MAKING

If every decision goes through you, you don't own a business. You own a job with overhead.

Can the Business Run Without You?

Answer honestly.

☐ The owner hands off decisions and doesn't take them back.
☐ Managers can make decisions without asking.
☐ Every leader has a defined role.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

☐ Leaders meet every week, on a schedule.
☐ Leaders decide with numbers, not gut feel.
☐ Every number has an Accountable Owner, and everyone knows who.
☐ The owner can take two weeks off and the business keeps running.
☐ Everyone knows the top three priorities.

Founder Dependency Score

How much of the business runs through one person?

1 = Low dependency
5 = Extremely dependent
Score: _____ / 5

If you were gone for 30 days, what would stop first?

What changes first, and who is the Accountable Owner?

11. SCALING STRESS TEST

Imagine Your Business Grows 50%

Answer for 50% more business, starting next month.

Customers

Can we serve 50% more customers without a major decline in experience?
☐ Yes ☐ No ☐ Unsure

Employees

Can we recruit and onboard the people we need?
☐ Yes ☐ No ☐ Unsure

Operations

Can our processes handle the additional volume?
☐ Yes ☐ No ☐ Unsure

Technology

Can our systems handle the additional workload?
☐ Yes ☐ No ☐ Unsure

Cash Flow

Can we finance the working capital required?
☐ Yes ☐ No ☐ Unsure

Leadership

Can our management structure support the larger organization?
☐ Yes ☐ No ☐ Unsure

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

Quality
Will quality hold when we're busy?
☐ Yes ☐ No ☐ Unsure

THE FIRST THING THAT BREAKS

If demand increased tomorrow, what would fail first?

Why?

What would it take to fix it?

12. GROWTH READINESS SCORE

Count your marks in each area.

Area	Critical Gaps	Needs Attention	Ready
Strategy			
Financial			
Customers			
Sales & Marketing			
Operations			
People			
Technology			
Legal / Risk			
Suppliers			
Leadership			

YOUR READINESS LEVEL

READY TO SCALE

Mostly Ready, and no Critical Gaps. The foundation holds.
Next step: Write the growth plan. Give each weak area an Accountable Owner and check it at the 15-minute Tuesday review.

SCALE WITH CAUTION

A few Critical Gaps, or a lot of Needs Attention. You can grow, but something will break.
Next step: Build a 90-day plan for the gaps, then score again.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

NOT READY TO SCALE
Critical Gaps in several areas. Growing now just makes the problems bigger and more expensive.
Next step: Fix the foundation first. Pick the five gaps that cost the most and grab the wheel.

13. PRIORITY ACTION PLAN

Don't fix everything at once. You'll fix nothing.
Pick your **five most expensive gaps**. For each one, name the activity driver, the Accountable Owner and the date.
The Tuesday Test: For each activity driver, ask: could someone walk in tomorrow morning and move that number by doing something differently? If not, keep digging.

Priority	Issue	Activity Driver	Accountable Owner	Deadline
1				
2				
3				
4				
5				

14. THE PRE-SCALE GO / NO-GO DECISION

Seven questions. Answer them before you spend a dollar on growth.

Customers
Do customers genuinely want more of what we offer?
☐ Yes ☐ No ☐ Need more evidence

Economics
Does each new sale make money after every cost?
☐ Yes ☐ No ☐ Need more evidence

Capacity
Can we deliver more, on time, at the same quality?
☐ Yes ☐ No ☐ Need more investment

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

People

Do we have the leadership and talent required?

☐ Yes ☐ No ☐ Need more investment

Systems

Can our processes and technology handle growth?

☐ Yes ☐ No ☐ Need improvement

Cash

Can we finance the growth without creating unacceptable risk?

☐ Yes ☐ No ☐ Need more planning

Risk

Do we know our biggest risks, and does each have an Accountable Owner?

☐ Yes ☐ No ☐ Need more work

FINAL DECISION

Based on this assessment:

☐ **GO** — We're ready to grow.

☐ **GO WITH CONDITIONS** — We grow after we close specific gaps.

☐ **PAUSE** — We fix the foundation first.

Our conditions for scaling:

1.
2.
3.

90-DAY PRE-SCALE ACTION PLAN

The next 90 days

Days 1–30: Stabilize

Our top three priorities:

1.
2.
3.

Days 31–60: Strengthen

Which systems, people, processes or finances need work, and who is accountable for each?

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

Days 61–90: Prepare
What has to be proven before we grow?

LEADERSHIP COMMITMENT

We won't grow just because we can.
We'll grow when customers, cash, people, processes and systems can carry it.
Our most important improvement before scaling is:

Accountable Owner:

Deadline:

The number that tells us it worked:

Leadership signature: _____
Date: _____

FINAL CHECK

Before approving significant expansion, can we confidently answer **YES** to these questions?

☐ We know where our growth will come from.
☐ We understand the economics of growth.
☐ Customers want what we are planning to scale.
☐ Our operations can handle increased demand.
☐ Our team can support the next stage.
☐ Our systems and data can carry more volume.
☐ We have sufficient cash or financing.
☐ Major risks have been identified and addressed.
☐ Leadership can delegate effectively.
☐ Every goal has a number, a date and an Accountable Owner.

IF NOT, FIX THE FOUNDATION FIRST.

Bigger isn't the goal. Better numbers you can steer are.
Step 3: Grab the Wheel — Your Assignment. Pick the most expensive gap on this checklist. Name the Accountable Owner. Put the first action on the calendar this week, and check it at your 15-minute Tuesday review.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.

YOUR NEXT STEP

1. Take the free Countersteer Business Health Check at CountersteerWorks.com. Five minutes, all 12 functions scored. Your lowest score names the function to fix first.

2. Come to the seminar for that function, or the next monthly webinar ($97). Every seminar teaches one chapter of Grab the Wheel and Drive Your Business.

3. When you want your real numbers verified, book the Countersteer Diagnostic: $2,500 for a verified score on all 12 functions, your top three profit leaks in dollars and a 90-day plan, credited to the Countersteer Mastermind if you join within 60 days.

Jon Colen, Chief Executive Officer, Countersteer Works · Jon.Colen@CountersteerWorks.com · 346.626.2992

© 2026 Countersteer Works, LLC. All rights reserved. Countersteer Works, LLC owns the copyright in Grab the Wheel and Drive Your Business, the trademarks related to the Countersteer Method, and the supporting materials. Jon Colen is the author and creator, and the relevant rights are assigned to Countersteer Works, LLC in writing.

© 2026 Countersteer Works. Free for use inside your own business. Share the link, not the file: CountersteerWorks.com.