



Participant Workbook

Is Scaling the Right Move for Your Organizing Business?

POC Professional Development Workshop – June 26, 2025

Section 1: What Does Scaling Mean to You?

In your own words, how do you define 'scaling your business'? What does it look like in your world?

Section 2: Are You Ready to Scale?

Review the signs below. Check any that resonate with your current business situation:

- ☐ I'm fully booked and turning away clients
- ☐ My income has plateaued
- ☐ I've developed strong systems and repeatable processes
- ☐ I'm craving a leadership role or new challenge
- ☐ Others are asking to learn from me or work with me

Which of these signs show up in your business today? What do they tell you?

Section 3: Staying Solo – The Sweet Spot

Reflect on the benefits of staying solo. What's important to you about freedom, flexibility, and direct service?

Section 4: Preparing to Scale – Action Brainstorm

Which of these have you started?

- ☐ Documenting SOPs
- ☐ Creating training videos
- ☐ Building templates/forms
- ☐ Implementing project management tools
- ☐ Systematizing client onboarding
- ☐ Designing packages/pricing

What will you prioritize or start focusing on next month?

Section 5: Marketing & Networking for Growth

- Rate your confidence in the following areas (1 = low, 5 = high):
- Niche & messaging clarity: [1] [2] [3] [4] [5]
- Website with scalable offers: [1] [2] [3] [4] [5]
- Referral partnerships: [1] [2] [3] [4] [5]
- Content creation: [1] [2] [3] [4] [5]
- PR/media presence: [1] [2] [3] [4] [5]

What marketing action will you take in the next 30 days?

Section 6: Which Scaling Option Feels Right?

Check the options you're most drawn to:

- ☐ Hire subcontractors or employees
- ☐ License or train others in your method
- ☐ Offer virtual organizing or courses
- ☐ Create group or maintenance programs
- ☐ Offer coaching/mentorship

Section 7: Risk/Reward Matrix

List your top 3 pros and cons of scaling vs. staying solo:

Pros of Scaling:

Cons of Scaling:

Pros of Staying Solo:

Cons of Staying Solo:

Section 8: Scaling Readiness Rating

On a scale of 1 to 10, how ready do you feel to explore scaling?

[1] [2] [3] [4] [5] [6] [7] [8] [9] [10]

What one action will you commit to taking in the next 30 days?

Bonus: Creative Ways to Explore Scaling

- Interview someone who has scaled their business
- Map out your 'dream team' – what would they do?
- Create a mood board of your future business model
- Journal: What would scaling allow me to do more of?
- Take a walk and voice record your thoughts on what excites and scares you about growth

Notes:

[illegible]