

SCALE YOUR BUSINESS

WORKBOOK



DAN MARTELL

WELCOME

First off, respect. If you're reading this, you're not just watching videos hoping something clicks, you're ready to do the work.

This workbook is the action companion to the video training. Each phase comes with:

-  **Objective**
Why this matters
-  **Exercise**
Fill-in-the-blank questions, checklists, and tables
-  **Reflection**
Deeper questions that surface what's really holding you back

Don't skip ahead.

Each phase builds on the one before it.



Dan Martell
Founder & CEO



LET'S GET STARTED.



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INTRO

Scale Your Business Workbook

HOW DO YOU ACTUALLY SCALE A BUSINESS?



HOW DO YOU ACTUALLY SCALE A BUSINESS?

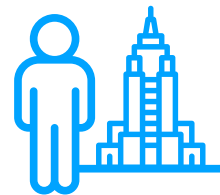
RIGHT NOW, YOU FALL INTO ONE OF TWO GROUPS:



GROUP 01

THE CHAOS BUILDER

You wake up every day reacting to problems. Your business runs you instead of you running it.



GROUP 02

THE EMPIRE BUILDER

You've built a machine that builds your business. It grows whether you're in the office, on vacation, or even asleep.

WHY THIS MATTERS

If you're in Group 1, this workbook will move you into Group 2—saving you years and millions of dollars in mistakes.

If you're already in Group 2, you may have hit a ceiling where growth stalls. This workbook will help you break through that ceiling and scale to the next level.



THE 6 PHASES OF SCALING

05. INSTALL LEADERSHIP & MANAGEMENT SYSTEMS

Build a team that leads, so you don't have to manage every detail.

03. BUILD A PREDICTABLE GROWTH ENGINE

Install repeatable systems that consistently drive revenue.

01. BUY BACK YOUR TIME

Create leverage by eliminating tasks that keep you stuck.

06. SCALE CULTURE & VISION

Lock in a culture that attracts top talent and keeps momentum alive.

04. STREAMLINE DELIVERY & OPERATIONS

Scale without breaking—through processes, not hustle.

02. CLARIFY STRATEGY & OFFER

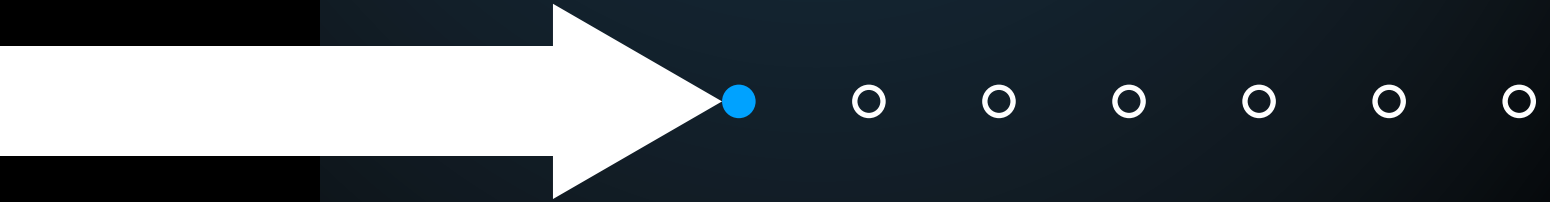
Nail down who you serve, what you sell, and why it matters.



PHASE 01

Scale Your Business Workbook

BUY BACK YOUR TIME





OBJECTIVE

Your business grows at the speed of your delegation. If you’re doing \$20/hour work while your time is worth \$500/hour, you’re already capped. This section will help you audit your time, calculate your buy back rate, and design your transfer plan, so you stop being the bottleneck.

EXERCISE 1

TIME AUDIT



Instructions

- 01. Track your tasks for the next 7 days. For each, list the time spent and its value.
- 02. Highlight all tasks below your buy back rate.
- 03. Decide whether you will keep doing it, or delegate.

Task	Hours Spent	\$ Value of Task	Delegate To (Who/Role)
Approving invoices	3	\$20/hr	Bookkeeper
Sales calls	5	\$500/hr	Me



EXERCISE 2

CALCULATE YOUR BUY BACK RATE



BUY BACK RATE FORMULA

$$\left(\frac{\text{Annual Income}}{\text{Hours Worked (2000)}} \right) \div 4 = \text{Buy Back Rate}$$

MY NUMBERS



Annual Income

\$ _____



Hours Worked

_____ hours

MY CALCULATION

$$\left(\frac{\text{\$}}{\text{⌚}} \right) \div 4 = \underline{\hspace{2cm}}$$

EVERY TASK WORTH LESS
THAN THIS? **DELEGATE.**



EXERCISE 3

TRANSFER PLAN



Instructions

- 01. Pick 3 tasks under your buy back rate.
- 02. Decide who/what system will own them.

Task	Time Required (Weekly)	Future Owner (EA, Contractor, Tool)	Deadline to Transfer

EXERCISE 4

FILL YOUR TIME WITH ROI
POSITIVE ACTIVITIES



Instructions

Now that you’ve freed up hours, decide where that energy goes.

High Value Activities I’ll Focus On



REFLECTION QUESTIONS



What am I afraid of letting go of, and what's the cost of holding on?

If my future self is making \$10M/year, what tasks would he laugh at me for still doing today?

ACTION STEP

Commit to delegating at least one task this week. Write it here:



“
**IF YOU DON'T
VALUE YOUR
TIME, NOBODY
ELSE WILL.**

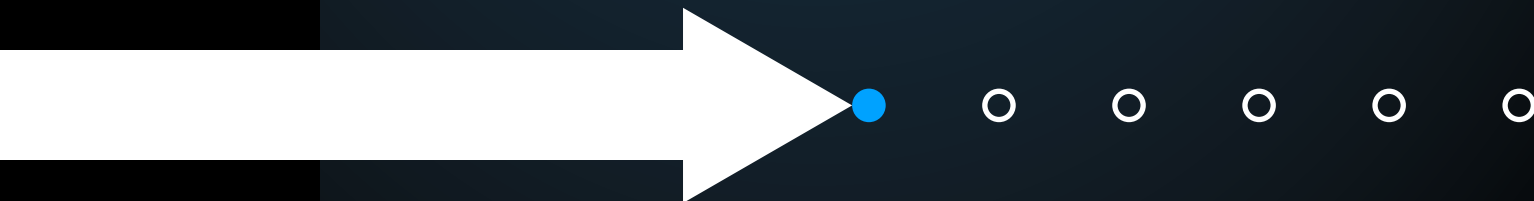
Dan Martell



PHASE 02

Scale Your Business Workbook

CLARIFY STRATEGY & OFFER





OBJECTIVE

You can't scale confusion. Early growth comes from saying yes to everything. But at scale, that's exactly what stalls you. This section will help you sharpen your offer so your team, customers, and systems are all aligned toward one clear path.

EXERCISE 1

THE OFFER AUDIT



Instructions

I can almost guarantee, if you're selling more than one thing, 80% of your revenue comes from 20% of your products. AND, 80% of your headaches come from 20% of your products. Let's get clear on where you get the most value, with the least effort.

- Step 1: List all current offers/services.
- Step 2: Look at the data and decide to either Keep or Cut the offer.

Offer / Service	% of Revenue	% of Profit	Customer Demand (High/Med/Low)	Energy Drain (High/Med/Low)	Keep or Cut
SEO	25%	10%	High	High	Cut
Paid Ads for SaaS	50%	80%	Medium	Low	Keep

- Step 3: Circle the ONE offer that brings the highest profit and the least chaos. It's not that you should ignore everything else, but this is the one to double down on.

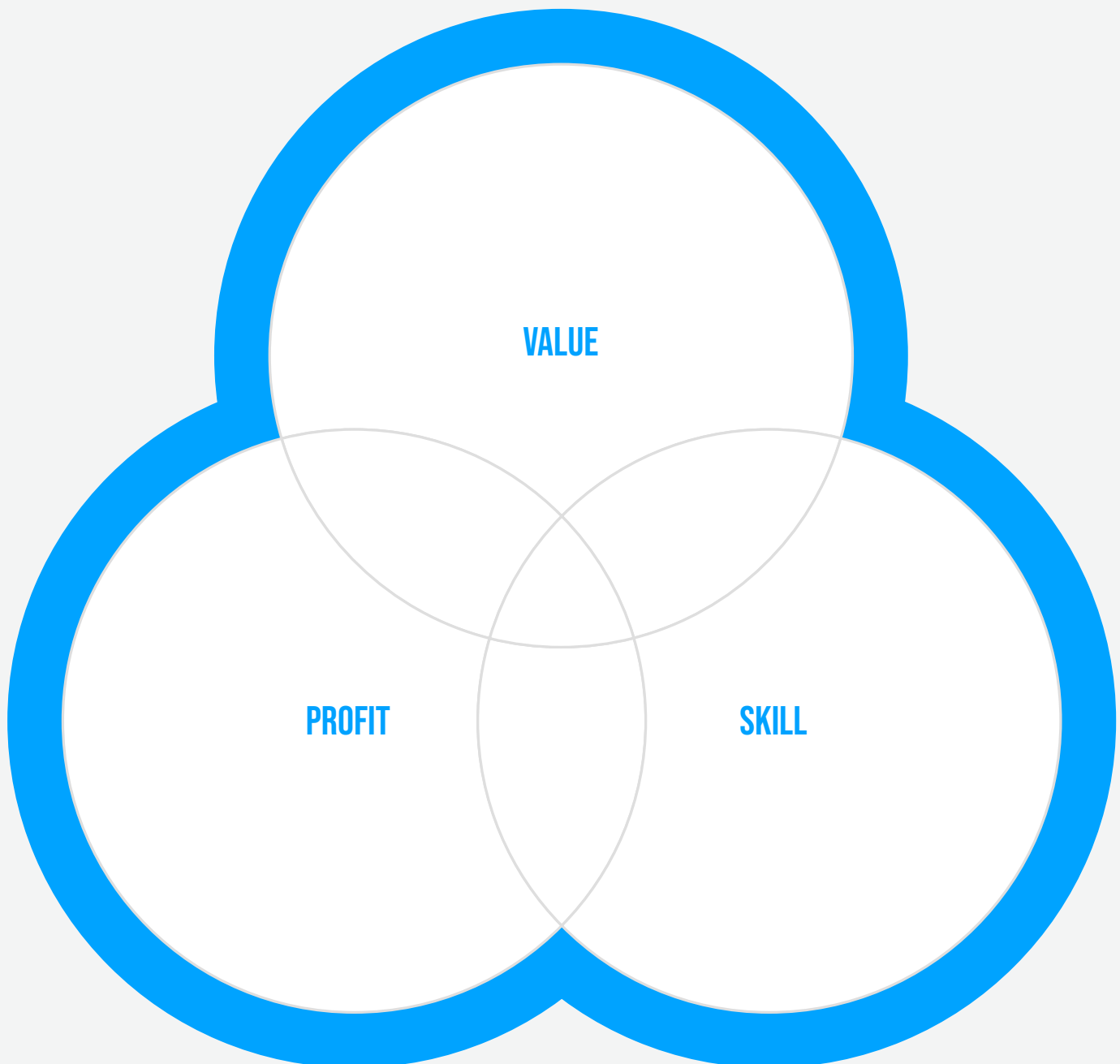


EXERCISE 2

THE VALUE CREATION VENN

**Instructions**

If you need another way to look at your offers, you can decide your core focus with this. Use the Venn diagram below to write the offers/services that apply to each criteria. Ask yourself: *What do customers value most? What do we do best? What's most profitable?* When you get to a point you can put an offer/service in the middle of all 3, you've found your focus.



EXERCISE 3

OFFER SHARPENING QUESTIONS



By this point you should be able to answer the following questions:

What offer generates most of my profits right now?

What offer do I need to cut immediately?

If I ONLY sold one thing at scale, what would it be?



REFLECTION QUESTIONS



What am I saying yes to that's actually slowing me down?	If I doubled down on my #1 offer for 18 months, where would I be?

ACTION STEP

Put ONE block on your calendar each week to sharpen your focus on your ONE key offer. Write it here:



“
**MOST COMPANIES
DIE FROM
INDIGESTION, NOT
STARVATION.**

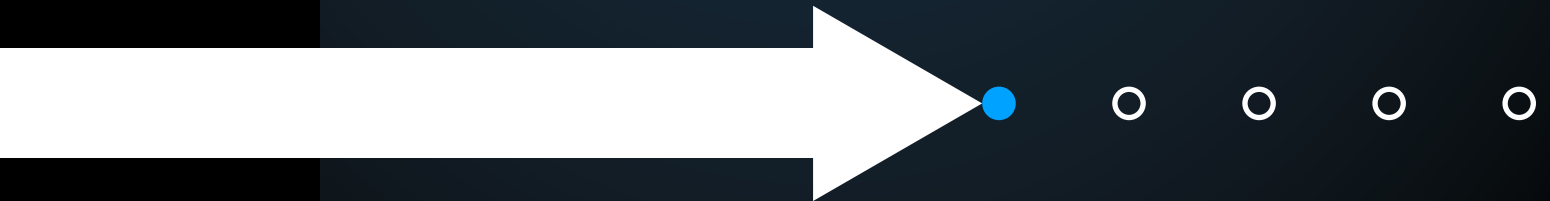
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PHASE 03

Scale Your Business Workbook

BUILD A PREDICTABLE GROWTH ENGINE





OBJECTIVE

Hope is not a growth strategy. Businesses that scale don’t gamble on growth, they build systems that make revenue consistent and predictable. This section will help you map your growth engine so your business stops riding a rollercoaster and starts running on autopilot.

EXERCISE 1

CURRENT GROWTH CHANNELS



Instructions

Before you start changing your strategy, we have to understand what’s working, and what’s not. Where are you getting new customers from? What channels do you have control over? Dig to find as much data as you can to support this, make estimates for what you’re missing.

Step 1: List all your current growth channels and evaluate them using this table:

Channel	Current ROI (High/Med/Low)	% of Revenue	Predictability (High/Med/Low)	Notes
Referrals	High	40%	Low	Unreliable, no control
Paid Ads	Medium	30%	Medium	Costs rising
Outbound Sales	Low	20%	Low	Inconsistent effort

Step 2: Circle the top 1 or 2 that drive the highest ROI, with the highest amount of predictability.



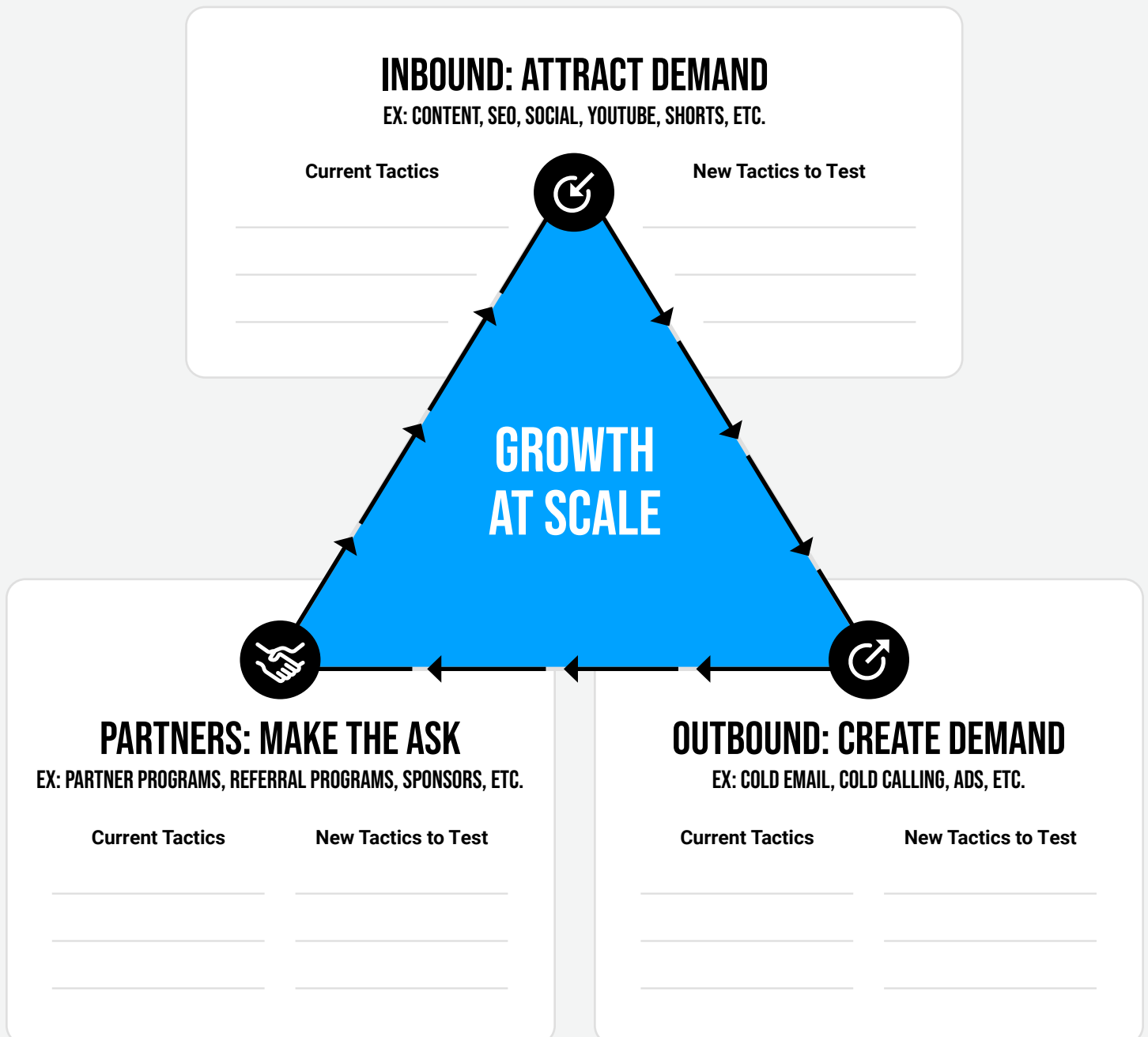
EXERCISE 2

THE GROWTH ENGINE TRIANGLE



Instructions

Growth at scale requires 3 engines working together. Fill each section with your current tactics and new ones you will add.



EXERCISE 3

PREDICTABILITY SCORECARD



Instructions

Before you implement any of the new potential tactics, rate each part of your current growth engine.

INBOUND					
Consistency (Circle One)	1	2	3	4	5
ROI (Circle One)	1	2	3	4	5
Scalable? (Circle One)	☐ Yes ☐ No				
Priority Action					
OUTBOUND					
Consistency (Circle One)	1	2	3	4	5
ROI (Circle One)	1	2	3	4	5
Scalable? (Circle One)	☐ Yes ☐ No				
Priority Action					
PARTNERS					
Consistency (Circle One)	1	2	3	4	5
ROI (Circle One)	1	2	3	4	5
Scalable? (Circle One)	☐ Yes ☐ No				
Priority Action					



REFLECTION QUESTIONS



If my biggest client left tomorrow, what would happen to my business?	If one channel died tomorrow, would I survive or panic?	What growth levers give me control, not just luck?

ACTION STEP

Choose one new system to add (inbound, outbound, or partners) and set a 30-day goal to test it. Write it here:



“

**YOU DO NOT RISE TO
THE LEVEL OF YOUR
GOALS. YOU FALL TO
THE LEVEL OF YOUR
SYSTEMS.**

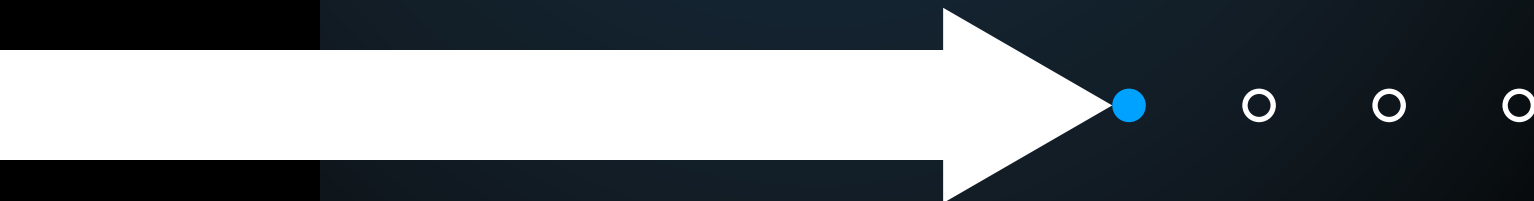
James Clear



PHASE 04

Scale Your Business Workbook

STREAMLINE DELIVERY & OPERATIONS





OBJECTIVE

You can't scale mistakes. If your delivery breaks as you grow, you'll spend more money filling a leaky bucket instead of compounding growth. This section helps you document, systemize, and automate your operations so retention fuels momentum instead of draining it.

EXERCISE 1

DELIVERY HEALTH CHECK



Instructions

Answer Yes or No for each area to understand how systemized your service/product delivery is, and what areas you can improve:

 SOPS DOCUMENTED FOR EVERY MAJOR PROCESS	☐ Yes ☐ No	Notes:
 CLIENT ONBOARDING MAPPED AND CONSISTENT	☐ Yes ☐ No	Notes:
 CUSTOMER SUCCESS ROLES CLEARLY DEFINED	☐ Yes ☐ No	Notes:
 SUPPORT TICKETS RESOLVED WITHIN SLA (SERVICE LEVEL AGREEMENTS)	☐ Yes ☐ No	Notes:
 CHURN TRACKED AND REPORTED MONTHLY	☐ Yes ☐ No	Notes:
 AUTOMATIONS IN PLACE FOR REPETITIVE TASKS	☐ Yes ☐ No	Notes:



EXERCISE 2

NET RETENTION TRACKER



1. How to Calculate

Take the number of clients you started with (CS), subtract the clients you lost (CL), then divide by the number you started with. Multiply by 100 to get the percentage.

NET RETENTION FORMULA

$$\left(\frac{CS - CL}{CS} \right) \times 100 = \text{Net Retention \%}$$

2. What's a Good Net Retention %?



GREAT (90-100%)

Your growth is sustainable



OKAY (80-89%)

There is room to improve



POOR (BELOW 80%)

Too leaky—growth will stall

3. Track your churn and retention over the last 3 months:

Month	# Clients Start	# Clients Lost	Net Retention %	Notes



EXERCISE 3

IDENTIFY BOTTLENECKS

**Instructions**

What are the top 3 operational or delivery bottlenecks in your business? Prioritize ones that affect your customers first. Use these as your key project list for the next 30 days.

The diagram consists of three white rectangular boxes with rounded corners, arranged horizontally. Each box has a blue header with a white number: '01' on the left, '02' in the center, and '03' on the right. Below each number, the word 'BOTTLENECK' is written in bold black capital letters. The boxes are empty for user input. At the bottom center, there is a grey circular base with three blue arrows pointing upwards towards the three boxes. A small black mountain icon is located in the bottom left corner.

REFLECTION QUESTIONS



Where am I pouring champagne into a cracked glass?	What would my delivery look like if 100 new clients signed up tomorrow?	Am I relying on heroic effort or scalable systems?

ACTION STEP

Choose one process to systemize (document, automate, or delegate) this week. Write it here:



“

REVENUE IS
FOR VANITY.
RETENTION IS
FOR SANITY.

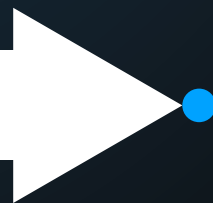
Dan Martell



PHASE 05

Scale Your Business Workbook

INSTALL LEADERSHIP & MANAGEMENT SYSTEMS





OBJECTIVE

Businesses don’t scale through founders, they scale through leaders. If every decision still flows through you, you’re the bottleneck. This section helps you build leadership systems so your team owns outcomes, and you finally step fully into the CEO role.

EXERCISE 1

DECISION LADDER



Instructions

If you’re still approving every decision and purchase, you’re holding back growth. This framework lets your team own outcomes, with enough freedom to make decisions that won’t drain your bank account.

Define who should own decisions at different dollar levels. You can make these individual names, or job titles (specialists, managers, directors, etc.).

\$50,000	Decision Owner:	Notes:
\$5,000	Decision Owner:	Notes:
\$500	Decision Owner:	Notes:
\$50	Decision Owner:	Notes:



EXERCISE 2

DELEGATION MAP



Instructions

List the top 5 decisions or approvals that still come back to you. Then assign who should own them going forward.

CURRENT DECISION Hiring & Firing	➔	Future Owner (Role/Person): HR Director	Deadline to Transfer: End of Q2
CURRENT DECISION Mergers & Acquisitions	➔	Future Owner (Role/Person): CFO	Deadline to Transfer: End of Year
CURRENT DECISION Vendor/Partnership Deals	➔	Future Owner (Role/Person): Ops & Procurement	Deadline to Transfer: 60 Days
CURRENT DECISION	➔	Future Owner (Role/Person):	Deadline to Transfer:
CURRENT DECISION	➔	Future Owner (Role/Person):	Deadline to Transfer:
CURRENT DECISION	➔	Future Owner (Role/Person):	Deadline to Transfer:
CURRENT DECISION	➔	Future Owner (Role/Person):	Deadline to Transfer:



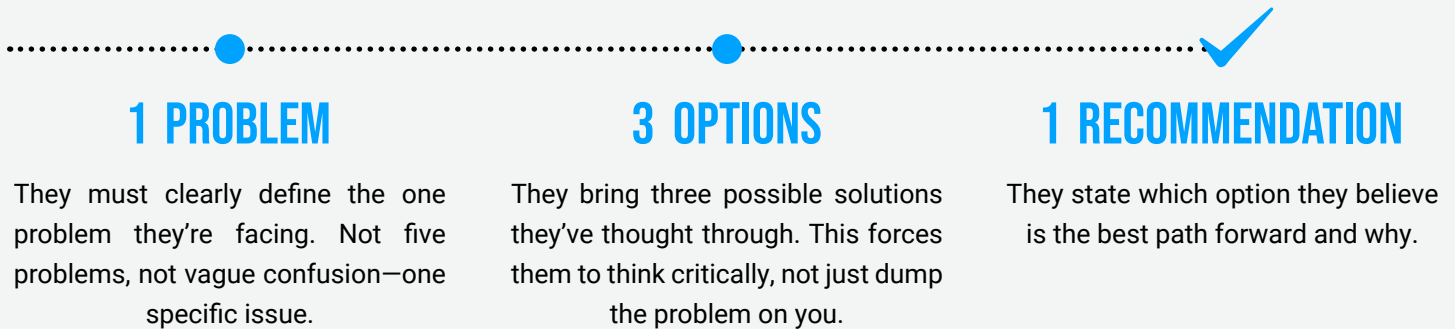
EXERCISE 3

THE 1-3-1 RULE



Instructions

The 1-3-1 rule encourages ownership and critical thinking while saving leaders from becoming the default problem-solver. Here's how it works:



Practice by writing one problem, three solutions, and your recommendation. Then share it with your team:

Problem			

Solution 01	Solution 02	Solution 03

MY RECOMMENDATION



EXERCISE 4

LEADERSHIP RHYTHM



Instructions

Plan your cadence of meetings and reviews. Without cadence, issues pile up until they explode in ad hoc fire drills. Regular reviews create feedback loops so you can spot trends early.

	Key Agenda Items	Day/Time	DRI (Role)	Notes
DAILY STANDUP				
WEEKLY TEAM MEETING				
MONTHLY REVIEWS				
QUARTERLY PLANNING				
ANNUAL OFFSITE				



REFLECTION QUESTIONS



If every road still leads back to me, what's the cost to my business?	What role do I need to hire next to unlock growth?	Am I building leaders, or just more followers?

ACTION STEP

Commit to transferring ONE recurring decision or approval to your leadership team this month. Write it here:



“

**TRUE LEADERS
CREATE MORE
LEADERS, NOT
MORE FOLLOWERS.**

Dan Martell



PHASE 06

Scale Your Business Workbook

SCALE CULTURE & VISION





OBJECTIVE

Culture is the ultimate growth multiplier. Ignore it, and it silently kills your company. Build it with intention, and it attracts A-players, fuels retention, and aligns your team around a bigger mission than just money. This section helps you define your culture and install systems that keep it alive as you scale.

EXERCISE 1

CORE VALUES



Instructions

List your top 3 non-negotiable values. These should guide hiring, firing, promotions, and daily decisions. Yes, put them on your wall, but they're only your values if you make decisions from them.

Value	What It Means in Action	How We Reward It
"Simple Scales"	We eliminate complexity	Public recognition in team meetings
"Be the Example"	Leaders model what they expect	Promote from within
"Build the People"	We invest in growth of team	Budget for training & coaching

Value	What It Means in Action	How We Reward It



EXERCISE 2

VISION NARRATIVE



Instructions

Write a future-cast narrative describing your company 5 years from now. Imagine you're writing from the future, explaining what the company looks like, who you serve, and what impact you've created.

CRAFT YOUR VISION

***“IT’S 5 YEARS FROM NOW. OUR COMPANY IS
AT \$ _____ REVENUE. WE ARE KNOWN
FOR _____. OUR TEAM
FEELS _____. OUR CUSTOMERS
SAY _____. THE CULTURE
HERE IS _____. WE’VE CREATED
IMPACT BY _____.”***

THEN SHARE IT



EXERCISE 3

PEOPLE SYSTEMS AUDIT

**Instructions**

Evaluate whether your culture and values show up in key decisions around your people.

	Aligned With Values?	How could it change?
 HIRING DECISIONS	☐ Yes ☐ No	
 FIRING DECISIONS	☐ Yes ☐ No	
 PROMOTIONS	☐ Yes ☐ No	
 TEAM RITUALS (MEETINGS, RETREATS, CELEBRATIONS)	☐ Yes ☐ No	
 PERFORMANCE REVIEWS	☐ Yes ☐ No	



EXERCISE 4

CULTURE SCORE



Instructions

Leadership isn't just about building a productive team, it's about building a movement. Use these questions to evaluate how your culture shows up in reality. Answer each with 1–5 (1 = Very Weak, 5 = Very Strong).

	Very Weak	Weak	Neutral	Strong	Very Strong
OUR TEAM COULD RECITE OUR CORE VALUES WITHOUT LOOKING THEM UP	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
WE HIRE AND FIRE BASED ON VALUES, NOT JUST SKILLS	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
OUR VISION IS REPEATED SO OFTEN PEOPLE ROLL THEIR EYES	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
MORALE IS HIGH, AND A-PLAYERS WANT TO STAY	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
TOXIC BEHAVIORS ARE DEALT WITH IMMEDIATELY	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5

TOTAL SCORE:

/25



REFLECTION QUESTIONS



Would I be proud if my team lived these values without me in the room?	Am I building culture by design or by default?	What's one ritual or tradition we could start this month to reinforce culture?

ACTION STEP

Define or refine your 3 Core Values and share them in your next all-hands meeting. Write them here:



TAKING YOUR NEXT STEPS



TAKE A DEEP BREATH.

**YOU'VE JUST WORKED THROUGH
THE 6 PHASES OF SCALING
YOUR BUSINESS:**

01. BUY BACK YOUR TIME

Create leverage by eliminating tasks that keep you stuck.

02. CLARIFY STRATEGY & OFFER

Nail down who you serve, what you sell, and why it matters.

03. BUILD A PREDICTABLE GROWTH ENGINE

Install repeatable systems that consistently drive revenue.

04. STREAMLINE DELIVERY & OPERATIONS

Scale without breaking—through processes, not hustle.

05. INSTALL LEADERSHIP & MANAGEMENT SYSTEMS

Build a team that leads, so you don't have to manage every detail.

06. SCALE CULTURE & VISION

Lock in a culture that attracts top talent and keeps momentum alive.

**THIS WORKBOOK ONLY
WORKS IF *YOU DO*.**

**Don't let these pages sit empty. Fill them in.
Revisit them often. Share them with your team.**



THANK YOU

Remember:

- 01 You don't scale through doing more. You scale by doing less of the wrong things and more of the right things.
- 02 Your job isn't to be the operator anymore. Your job is to be the CEO.
- 03 Scaling is less about adding and more about letting go.

Next Steps:

If you want to go deeper and get my help to scale your business past \$10M+, click the link below and I'll reach out to see if it's a fit.



Dan Martell
Founder & CEO

danmartell.com/message





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