Unlocking Potential:

Turning Vision into Scalable Growth



Toolkit Event Workbook

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INTRODUCTION



Sustainable growth doesn't happen by accident. As a business grows, the decisions become bigger, the demands on people increase and the processes that worked in the past can begin to hold it back.

Having a clear vision of where you are heading – and understanding what needs to change to get there – helps you focus resources, make better decisions and turn growth ambitions into achievable results.

ARE YOU READY FOR GROWTH?

Every buisness is different, but here are 5 questions you should ask yourself as you look to unlock scaleable growth:

1. **Is our vision clear enough to guide our growth? -** Do we know what we want the business to look like in three years – beyond simply a turnover target?
2. **Do we really understand where profitable growth will come from?** - Which customers, markets, products or services offer the greatest opportunity – and which should we stop pursuing?
3. **Can our people scale with the business?** - Do we have the right leadership, skills, capacity and accountability, or is the business still too dependent on a few individuals?
4. **Will our processes and systems cope with growth?** - What works at today's size could become tomorrow's bottleneck. Where are the weaknesses that increased volume will expose?
5. **Do we have the financial visibility and resources to fund growth?** - Do we understand margins, cash requirements, capacity and investment needs – and can we measure whether growth is actually creating value?

UNLOCKING LASTING SUCCESS



Maximising business value through focused growth, powerful strategy, strong leadership and highly motivated teams.

Accelerate Profitable Growth

Build High-Performing Teams

Design & Deliver Winning Strategies

FIND OUT IF YOUR BUSINESS IS READY FOR GROWTH



OptIQ BUSINESS DIAGNOSTIC

A free buisness diagnostic report for your organisation

- Takes under 4 minutes
- Highlights strengths and hidden constraints
- Produces a clear report with practical next steps

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Book your free consultation to help scale your buisness

GROWTH FROM WITHIN:

WHERE IS THE UNTAPPED GROWTH POTENTIAL ALREADY INSIDE YOUR BUSINESS?

Score each area from 1–5, then capture the evidence or opportunity you can see.

The aim is not to score highly – it is to identify where focused action could unlock profitable growth.

1 - **Little scope:** *Already optimised*
2 - **Limited:** *Some opportunity*
3 - **Moderate:** *Worth exploring*
4 - **Significant:** *Clear opportunity*
5 - **High:** *Major untapped potential*

1. INCREASE PRODUCTIVITY

Score 1-5:

Could you get more output from existing people, equipment or capacity?

Evidence / opportunity:

2. GROW EXISTING CUSTOMERS

Score 1-5:

Where could you cross-sell, upsell, or increase customer spend?

Evidence / opportunity:

3. IMPROVE PRICING & MARGINS

Score 1-5:

Can you improve pricing, reduce discounting, or strengthen margins?

Evidence / opportunity:

4. DEVELOP YOUR PEOPLE

Score 1-5:

Could stronger skills, leadership, or accountability lift performance?

Evidence / opportunity:

5. IMPROVE PROCESSES & SYSTEMS

Score 1-5:

Where are waste, bottlenecks, rework, or manual tasks holding you back?

Evidence / opportunity:

6. FOCUS ON PROFITABLE WORK

Score 1-5:

Do you know which customers, jobs, products, or services create the most value?

Evidence / opportunity:

7. IMPROVE CUSTOMER RETENTION

Score 1-5:

What could you do to keep your good customers longer and increase repeat business?

Evidence / opportunity:

8. EXPLOIT NEGLECTED SEGMENTS

Score 1-5:

Are attractive niches being underserved or vacated by larger competitors?

Evidence / opportunity:

TURN INSIGHT INTO ACTION:

Your top growth opportunity

One action to investigate it

What would success look like?

Before looking outside for growth, ask how much untapped potential already exists inside your business.

BUILD YOUR VISION:

FROM LONG-TERM DIRECTION TO 90-DAY ACTION

Work backwards from the future. Keep each answer concise and specific enough to guide decisions.

10-YEAR VISION

Think big-picture rather than detailed numbers. Describe the business you are trying to create, not how you will get there.

What will you be known for? _____

Who will your customers be? _____

What markets will you operate in? _____

What scale could the business reach? _____

What will make you different? _____

What will the business enable for you personally? _____

Notes:

Aim for: A clear, compelling destination that gives long-term decisions a sense of direction.

3-YEAR PICTURE

Bring the vision much closer and make it tangible. Imagine walking into the business three years from today.

What is your Profit and Turnover? _____

How many people are employed? _____

What does your leadership team look like? _____

Who are your key customers? _____

What products / services are driving growth? _____

What would have to be true for you to say, "We're firmly on the way"? _____

Notes:

Aim for: A specific picture you could recognise when you arrive there.

1-YEAR GOALS

Work backwards from your 3-year picture. Don't create a huge wish list – identify a small number of outcomes that would represent meaningful progress towards it.

What financial results are required? _____

Which customers or markets need developing? _____

What capability needs building? _____

What needs to change within the team? _____

What major problem needs solving? _____

Notes:

Aim for: Around 3–7 measurable outcomes, with a clear definition of success.

QUARTERLY PRIORITIES

Now turn strategy into action. Ask what must be achieved during the next 90 days to keep the annual goals on track.(Repeat this each quarter)

Each priority should have one clear owner, a deadline and an unambiguous outcome.

Check: "At the end of 90 days, will we be able to say definitively whether this has been completed?"

1. _____ Outcome: _____
   Deadline: _____
   Owner: _____

2. _____ Outcome: _____
   Deadline: _____
   Owner: _____

3. _____ Outcome: _____
   Deadline: _____
   Owner: _____

4. _____ Outcome: _____
   Deadline: _____
   Owner: _____

5. _____ Outcome: _____
   Deadline: _____
   Owner: _____

Aim for: 3–5 genuinely important priorities, rather than business-as-usual activity.

Better Results

More Time

Less Pressure

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Most businesses don't fail because of a lack of ideas...
...they fail because too many ideas never get traction.



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Slides, tools and other resources:

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