Key Questions to Consider for Developing a Scaling Strategy:

Strategy (approach and impact)

- How do you address the social problem through your product / service / methodology what is innovative about your approach?
- What is your "theory of change" and how are you currently bringing this change about?
- What social impact has your approach achieved thus far? What are your most compelling "success indicators" (number of beneficiaries, economic impact, health outcomes, etc.)?

Global Market Potential

- Describe the full market potential of your innovation - how many people, which demographic segments, and which countries and regions could potentially benefit from this innovation?
- What is the current expressed demand for your work?
- Who are the natural and perhaps not so obvious allies for you and your idea and why?

Goals and Components of Model to be Scaled

- What are your future goals of systems-change?
- What is the impact that you want to scale? What about your idea allows for widespread replication and adoption?
- What components of your model are most important to spread in order to have systems-change in your field? What components of your model are non-negotiable? What can be left for others to adapt and build on to make it easier to spread?

Potential Paths to Scale

- How do you want to get to your system change? How can your idea reach or get closer to its global market potential in the fastest way?
- What have you learned from your previous scaling efforts and those of others in the field that informs your approach to growing impact?
- Many scaling strategies will involve a set of different approaches. Which scaling models or strategies are best suited to scale your impact?

  - Growing your own organization (ex. Organic growth, Subsidiaries, M&A, etc.)
  - Opening up your idea for replication (ex. licensing, Open Source, etc.)
  - Creating "Smart Networks" through which you can distribute your product/methodology/tools and turn others into your sales force/allies (ex. network associations, partnerships where you piggyback, etc.)
  - Setting new standards (ex. advocacy, campaigns, movements, policy change, creation of new protocols, specialized trainings, etc.)
  - …… or other strategy?

Details of your Scaling Approach (ideal to answer question set for **each** different approach)

- <u>Financing</u>

  - What are the costs that you expect to have using this strategy?
  - How much capital would you need for this and what will it be used for?
  - Which form of financing would you be looking for?
  - Are there significant potential funds available for this method of scaling?

- <u>Opportunities and Challenges</u>

  - With this scaling strategy, who are your most likely partners?
  - Do you have sufficient organizational support and stability for this method?
  - What are the risks you see with this approach?
  - What infrastructure or systems are missing to support this strategy? (i.e. legal, financial, policy, open communication, etc.) What is your strategy to address these?

- <u>Expected Impact</u>

  - What is your expected social impact with this scaling strategy?
  - What are the tangible and intangible elements of the impact created and how will you measure them?

Finances overall
- How will your revenue sources need to change at much larger scale?
- How much funding is required for each new stage of expansion, to sustain impact in established geographies, and to capture network synergies?
- How will you secure the financial resources required to support your scaling efforts?

Milestones and Key Success Indicators
- What will be your key scaling milestones over the next few years?
- How will you measure your success going forward?

Top Anticipated Challenges
- Which elements of this strategy do you think will be the most difficult? What are the things that will be "keeping you up at night"? Where will you need the most outside help and/or guidance?

Team Overview
- Who are the key members of your team and what do they bring to the table?
- For your scaling effort, will this team need to be modified or expanded?

Succession Planning
- How will your role change as your innovation grows? What structures and capabilities must you embed within your organization to allow it to flourish as you move further away from direct operational involvement?