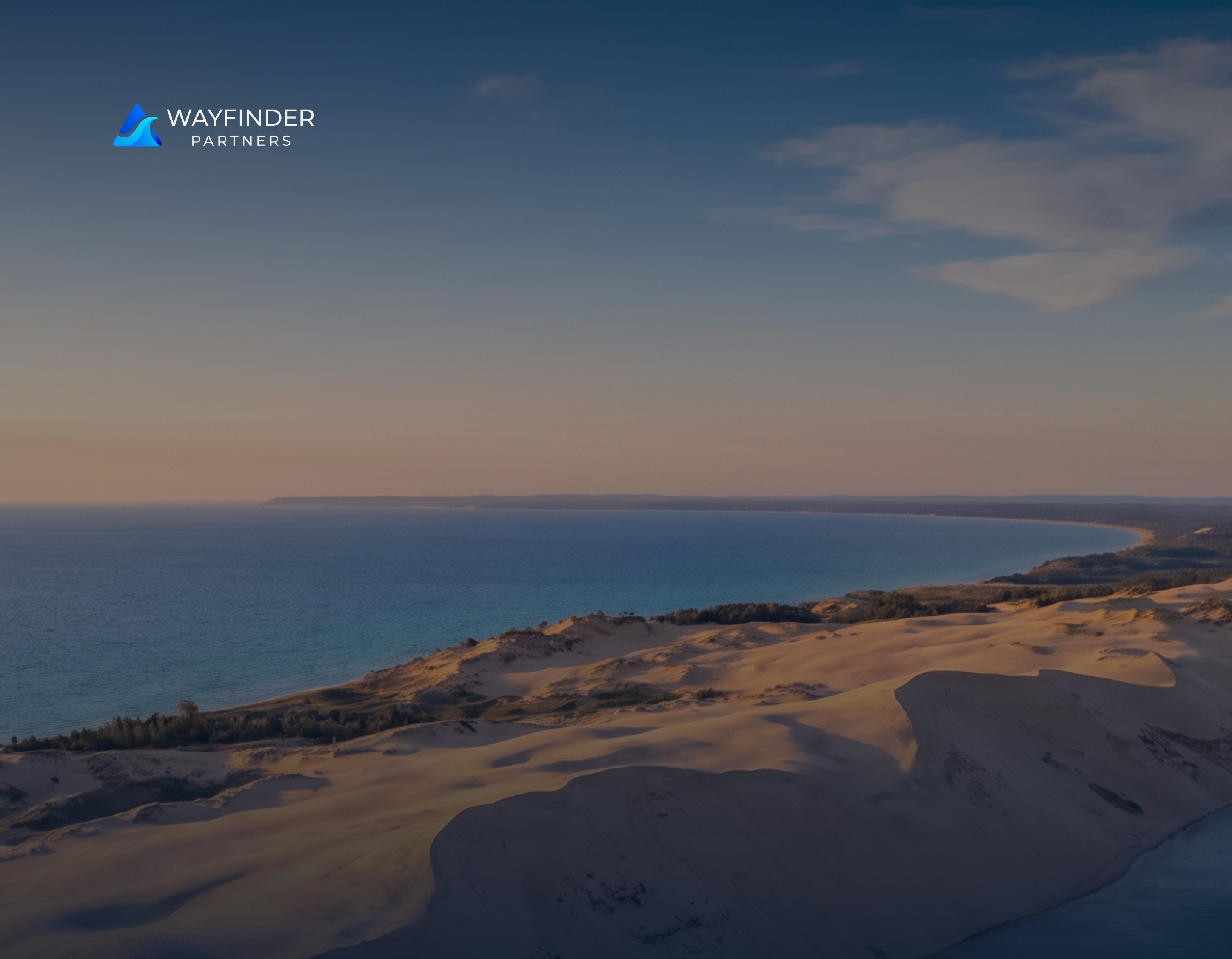

WAYFINDER
PARTNERS

WAYFINDER GROWTH PLANNING WORKBOOK

Build a practical 12-month growth plan for your business.

45 minutes
A working session, start to finish.

One page
Of output you can share and act on.

A clear route
Forward, with the decisions made.

WAYFINDERPARTNERS.COM

BEFORE YOU BEGIN

How to use this workbook

This workbook walks you through the five decisions behind every good growth plan. It works like a session with an advisor: each part teaches one idea, then asks you to make one decision. No filler, no busywork.

Set aside 45 minutes. Answer honestly with rough numbers; precision can come later. You'll finish holding a one-page Growth Route you can share with your team, your partner, or your advisor.

YOUR 45 MINUTES

1. **Set Your Growth Target**
   8 min
2. **Choose Your Growth Path**
   8 min
3. **Find Your Constraint**
   7 min
4. **Check the Economics**
   5 min
5. **Build Your Growth Route**
   7 min

About 35 minutes of actual writing.

Give yourself 45 and don't rush the decisions.

Look for these throughout the workbook.

Four recurring boxes. Each one does a different job.

NAVIGATOR INSIGHT

A perspective shift that helps you think differently about growth.

COMMON DETOUR

A mistake business owners frequently make that slows or derails growth.

DECISION POINT

A moment where you commit to a choice and move the plan forward.

WAYPOINT CHECK

A quick checkpoint to confirm you're ready for the next step.

PART 1 · 8 MINUTES

What are you trying to achieve?

"We want to grow" isn't a target. A real growth target has three parts: the **RESULT** you want, the **CHANGE** it requires in the business, and the **GUARDRAIL** you refuse to sacrifice along the way.

01		02		03
RESULT	+	**CHANGE**	+	**GUARDRAIL**
what improves		what becomes different		what must stay healthy

EXAMPLE

Grow to $4M annual revenue + by adding **25 active customers** + while holding **gross margin at 38% or better**.

NAVIGATOR INSIGHT

A strong target defines scale *and* quality. Revenue growth only counts when the business can deliver it profitably and sustainably. The guardrail is what separates growth from expensive motion.

1 Where you are, where you're going

Fill in rough numbers. Close is good enough. Then circle the **TWO** *rows that matter most to your growth story; they become your success measures.*

MEASURE	TODAY	12-MONTH TARGET
Annual revenue		
Gross margin %		
Active customers		
Average customer value		
Team size		
One measure you choose		

2 Choose your guardrail

Check the **ONE** *thing that must remain healthy while you grow.*

- ☐ Gross margin
- ☐ Cash reserves
- ☐ Customer experience
- ☐ Team workload
- ☐ Delivery quality
- ☐ Owner hours

Set its floor: ____________________

YOUR 12-MONTH GROWTH TARGET

We will grow from ____________________ to ____________________

while keeping ____________________ at or above ______________.

STEP INTO THE ARENA — Great plans only matter if you execute them.

What's one action you can take this week based on what you just decided? ____________________

Who needs to know? ______________ | When will you take it? ______________

COMMIT. ACT. REVIEW. REPEAT.

PART 2 · 8 MINUTES

Where will growth come from?

Every growth strategy is one of four paths. Most businesses could pursue several. The plan works when you choose **ONE** primary path for the next 12 months and point your energy, budget, and team at it.

	EXISTING OFFERINGS →	NEW OFFERINGS
EXISTING CUSTOMERS ↓	01 **SELL MORE** Grow within your current offering and current customers. Deepen usage, raise prices, win a larger share of their spend.	02 **SELL DIFFERENT** Expand what you offer to the customers you already serve. New products, services, or bundles for people who already trust you.
NEW CUSTOMERS	03 **NEW CUSTOMERS** Bring your current offering to more people like your best customers. More of what already works.	04 **NEW MARKETS** Take your offering somewhere new: a new segment, geography, or industry. Highest potential, highest risk.

COMMON DETOUR

Chasing two or three paths at once. Split focus means split budgets, split messaging, and slow progress everywhere. Pick one primary path; the others can wait a year.

1 Score the four paths

Rate each path with your gut. Ten seconds per row. The pattern tells you where your primary path is.

GROWTH PATH	FITS OUR BUSINESS	POTENTIAL IMPACT	CONFIDENCE WE CAN EXECUTE
SELL MORE	☐ Y ☐ N	☐ H ☐ M ☐ L	☐ H ☐ M ☐ L
SELL DIFFERENT	☐ Y ☐ N	☐ H ☐ M ☐ L	☐ H ☐ M ☐ L
NEW CUSTOMERS	☐ Y ☐ N	☐ H ☐ M ☐ L	☐ H ☐ M ☐ L
NEW MARKETS	☐ Y ☐ N	☐ H ☐ M ☐ L	☐ H ☐ M ☐ L

DECISION POINT

Look at your ratings. The right path usually scores yes-fit, high-impact, and at least medium confidence. If two paths tie, choose the one closer to customers you already have.

OUR PRIMARY GROWTH PATH

For the next 12 months our primary path is ____________________________

because ____.

STEP INTO THE ARENA — Great plans only matter if you execute them.

What's one action you can take this week based on what you just decided? ______________________________

Who needs to know? __________________ | When will you take it? __________________

COMMIT. ACT. REVIEW. REPEAT.

PART 3 · 7 MINUTES

What's most likely to stop you?

Growth doesn't fail evenly. It fails at one point: the constraint. Fix the constraint and everything downstream opens up. Fix anything else and you've made the business busier, not bigger.

DEMAND | Not enough of the right people know about you or want what you sell.

CONVERSION | Interest shows up but doesn't turn into signed customers.

CAPACITY | You could sell more than you can deliver without breaking quality or the team.

CASH | Growth requires money the business doesn't have available when it's needed.

EXECUTION | The plan depends on systems, people, or discipline that aren't in place yet.

You can't outgrow your constraint.

NAVIGATOR INSIGHT

Owners usually work on the constraint that's most comfortable, not the one that's most binding. The binding constraint is the one that would still stop you even if everything else went right.

1 Symptom check

Check every statement that's true today.

DEMAND

- [ ] Our pipeline depends on referrals we don't control.
- [ ] If our top lead source paused, growth would stall within a quarter.

CONVERSION

- [ ] We lose winnable deals and don't know exactly why.
- [ ] Our close rate would embarrass us if a peer asked.

CAPACITY

- [ ] New sales would strain delivery within 90 days.
- [ ] Quality or timelines already slip when volume rises.

CASH

- [ ] Funding this growth would require money we haven't secured.
- [ ] A slow-paying month would force us to delay the plan.

EXECUTION

- [ ] Key processes live in one person's head.
- [ ] We start initiatives that quietly die within 60 days.

WAYPOINT CHECK

The group with the most checks is your likely constraint. If two tie, the one **EARLIER** in the funnel wins; it hits you first.

OUR PRIMARY CONSTRAINT

The thing most likely to stop us is ______________________________,

and the first sign will be ____.

STEP INTO THE ARENA — Great plans only matter if you execute them.

What's one action you can take this week based on what you just decided? ____

Who needs to know? ____________________ | When will you take it? ____________________

COMMIT. ACT. REVIEW. REPEAT.

PART 4 · 5 MINUTES

Can the business afford this growth?

Growth consumes cash before it returns cash. New people are paid before they're productive. Marketing is spent before it converts. Inventory and tools are bought before revenue lands. A plan that ignores this timing gap fails while technically "working."

01 **INVESTMENT**

What will the first 6 months of this path actually require? (people, tools, marketing, inventory)

02 **CAPACITY**

Can we deliver the new volume without breaking what customers already love?

03 **CASH TIMING**

Can we cover the gap between spending and the return arriving?

04 **CONFIDENCE**

Knowing all this, how sure are we that this is the right plan right now?

COMMON DETOUR

Planning the upside without pricing the runway. Most growth plans that die don't die from a bad idea; they die from a funding gap nobody wrote down.

1 Price the runway

Four quick answers. Rough numbers are fine.

Rough investment required in the first 6 months:

$ ______________________________

The part of delivery most at risk if volume grows:

____

How we'll cover the gap before returns arrive (cash on hand / line of credit / phased spend / other):

____

Confidence, gut level, 1–10:

____

DECISION POINT

Circle one:

GO	ADJUST	DELAY
The economics hold; proceed.	Right path, wrong size or speed; scale the plan to the cash.	Fix the constraint or the funding first; revisit in 90 days.

There's no wrong answer here. ADJUST and DELAY are how disciplined operators protect the business.

In one line, why did you circle what you circled? ______________________________

OUR VERDICT

We are choosing to __________ because ______________________________.

STEP INTO THE ARENA — Great plans only matter if you execute them.

What's one action you can take this week based on what you just decided? ______________________________

Who needs to know? __________ | When will you take it? __________

COMMIT. ACT. REVIEW. REPEAT.

MY GROWTH ROUTE

A 12-month plan on one page

Transfer your decisions from Parts 1–4 below. Then choose three priorities that advance your growth path or remove your primary constraint over the next 90 days.

BUSINESS NAME ______________________________ DATE ______________

1 DESTINATION — FROM PART 1

We will grow from ______________________ to ______________________

while keeping ______________________ at or above ______________.

2 PATH — FROM PART 2

Our primary growth path is ____.

3 CONSTRAINT — FROM PART 3

Most likely to stop us: ____.

4 VERDICT — FROM PART 4

GO / ADJUST / DELAY — because ________________________________.

5 NEXT 90 DAYS

PRIORITY 1	PRIORITY 2	PRIORITY 3
______________	______________	______________

6 FIRST ACTION THIS WEEK

____ Owner: ______________

7 SUCCESS MEASURE + REVIEW DATE

We'll know it's working when ____.

We review on ________ / ________ / ________.

WAYPOINT CHECK

Read your Growth Route aloud. If every line makes sense to someone who wasn't in the room, your route is ready. Put the review date on your calendar before closing this workbook.

WAYFINDER PARTNERS

COMMIT. ACT. REVIEW. REPEAT.

WAYFINDER
PARTNERS

YOUR NEXT WAYPOINT

You know where you're going. Now build the route in detail.

A **Waypoint Session** is a working conversation with a Wayfinder advisor about YOUR Growth Route: pressure-testing the path, sizing the investment, and mapping the financial decisions between you and your destination. Bring this workbook. We'll take it from here, together.

Book your Waypoint Session →

Scan with your phone camera