Example 5 Year Plan
Easy Scaling
2024-2028

Example exercises/prompts that guide our 5 year planning:
- Mission Statement
- Vision Statement
- 10-Year Vision Objectives
- SWOT Analysis
- 5 Year Goals and KPIs
  - i.e., revenue, owner salary
- Key Strategic Initiatives
  - i.e., for growth, for profit, or for XYZ measurable goal

Easy Scaling 5 Year Plan

Year 0: 2023

Revenue Goal: 600k+

Growth KPIs:
- **Product Suite:** Finalize offers and sales goals for 2023 and 2024
- **Podcast Downloads:** Increase monthly podcast downloads to 2,000
- **Email Subscriber List:** Grow the email subscriber list to 10,000
- **Instagram Follower Growth:** Reach 4,000+ Instagram followers
- **Collaborative In-Person Events:** Start initial planning of one in-person event to take place in 2024
- **PR Initiatives:** Map out small, medium, and large PR initiatives for 2023 and 2024 and design implementation plans for each

Profit KPIs:
- **Tighten Profit Margins:** Set target profit margin and other financial goals
- **Revenue-Sharing Program**: Refine client requirements for participation
- **Optimize Organizational Efficiency + Effectiveness:** Audit and adjust company org chart and individual roles and responsibilities
- **Passive Product Funnel:** Promote annual planning digital product November, December, January + Roll out evergreen funnel for Scaling School

Impact KPIs:
- **Scaling School Quality Improvement:** Finalize program delivery and client support process and achieve average customer satisfaction rating of 4.0 out of 5 on year end survey
- **Customer Feedback and Reviews:** Develop process for client testimonial use across all programs
- **Content Creation:** Improve in-house content creation process for maximum efficiency, impact, frequency, and consistency across all platforms
- **Continuous Profit Donation:** Make donation to Givewell for 1% of annual profits

Year 1: 2024

Revenue Goal: 1.2m+ (100% growth rate YoY)

Growth KPIs:
- **Podcast Downloads:** Increase monthly podcast downloads to 5,000
- **Email Subscriber List:** Grow the email subscriber list to 25,000
- **Instagram Follower Growth:** Reach 10,000+ Instagram followers
- **Collaborative In-Person Events:** Successfully host one in-person event
- **PR Initiatives:** Execute at least two of the planned PR initiatives (e.g., press releases, media outreach) during the year

Profit KPIs:
- **Tighten Profit Margins:** Achieve a XX% profit margin by year end
- **Revenue-Sharing Program:** Increase average revenue sharing income to $XXXX per client per month
- **Streamlined Admin Tasks:** Reduce the time spent on administrative work by XX%
- **Process Management Integration:** Achieve a XX% increase in operational efficiency.
- **Brand Awareness Initiatives:** Increase brand recognition by XX%

Impact KPIs:
- **Scaling School Quality Improvement:** Improve the quality of Scaling School content and achieve average customer satisfaction rating of 4.2 out of 5
- **Customer Feedback and Reviews:** Roll out a coordinated effort for requesting feedback across offers and seeking public reviews on key platforms
- **Content Creation:** Expand content publication to one additional platform
- **Continuous Profit Donation:** Make donation to Givewell for 2% of annual profits
- **Sponsorships and Partnerships:** Secure one major inbound and one major outbound sponsorship

Year 2 (2025)

Revenue Goal: 2m+ (70% growth rate YoY)

Growth KPIs:
- **Podcast Downloads:** Increase monthly podcast downloads to 8,000
- **Email Subscriber List:** Grow the email subscriber list to 35,000
- **Instagram Follower Growth:** Reach 20,000+ Instagram followers
- **Collaborative In-Person Events:** Successfully host three in-person events
- **PR Initiatives:** Execute at least three of the planned PR initiatives (e.g., feature in industry publication, major podcast, major award) during the year

Profit KPIs:
- **Tighten Profit Margins:** Achieve a XX% profit margin by year end
- **Revenue-Sharing Program:** Increase average revenue sharing income to $XXXX per client per month
- **Streamlined Admin Tasks:** Reduce the time spent on administrative work by XX%
- **Process Management Integration:** Achieve a XX% increase in operational efficiency.
- **Brand Awareness Initiatives:** Increase brand recognition by XX%

Impact KPIs:
- **Scaling School Quality Improvement:** Expand Scaling School content and maintain average customer satisfaction rating of 4.3 out of 5
- **Customer Feedback and Reviews:** Maintain a 4.3-star rating or higher on review platforms
- **Content Creation:** Expand content publication to one additional platform
- **Continuous Profit Donation:** Make donation to Givewell for 3% of annual profits
- **Sponsorships and Partnerships:** Secure two major inbound and one major outbound sponsorships

Year 3 (2026)

Revenue Goal: 3m+ (50% growth rate YoY)

Growth KPIs:
- **Podcast Downloads:** Increase monthly podcast downloads to 10,000
- **Email Subscriber List:** Grow the email subscriber list to 45,000
- **Instagram Follower Growth:** Reach 30,000+ Instagram followers
- **Collaborative In-Person Events:** Successfully host four in-person events
- **PR Initiatives:** Execute at least four of the planned PR initiatives (e.g., feature in national media, multiple major podcasts, major award) during the year

Profit KPIs:
- **Tighten Profit Margins:** Achieve a XX% profit margin by year end
- **Revenue-Sharing Program:** Increase average revenue sharing income to $XXXX per client per month
- **Streamlined Admin Tasks:** Reduce the time spent on administrative work by XX%
- **Process Management Integration:** Achieve a XX% increase in operational efficiency.
- **Brand Awareness Initiatives:** Increase brand recognition by XX%

Impact KPIs:
- **Scaling School Quality Improvement:** Expand Scaling School content and maintain average customer satisfaction rating of 4.4 out of 5
- **Customer Feedback and Reviews:** Maintain a 4.4-star rating or higher on review platforms
- **Content Creation:** Expand content publication to one additional platform
- **Continuous Profit Donation:** Make donation to Givewell for 4% of annual profits
- **Sponsorships and Partnerships:** Secure four major inbound and two major outbound sponsorships

Year 4 (2027)

Revenue Goal: 4m+ (30% growth rate YoY)

Growth KPIs:
- **Podcast Downloads:** Increase monthly podcast downloads to 15,000
- **Email Subscriber List:** Grow the email subscriber list to 60,000
- **Instagram Follower Growth:** Reach 40,000+ Instagram followers
- **Collaborative In-Person Events:** Successfully host four in-person events
- **PR Initiatives:** Execute at least four of the planned PR initiatives (e.g., feature in national media, paid speaking opp, major award) during the year

Profit KPIs:
- **Tighten Profit Margins:** Achieve a XX% profit margin by year end
- **Revenue-Sharing Program:** Increase average revenue sharing income to $XXXX per client per month
- **Streamlined Admin Tasks:** Reduce the time spent on administrative work by XX%
- **Process Management Integration:** Achieve a XX% increase in operational efficiency.
- **Brand Awareness Initiatives:** Increase brand recognition by XX%

Impact KPIs:
- **Scaling School Quality Improvement:** Expand Scaling School content and maintain average customer satisfaction rating of 4.5 out of 5
- **Customer Feedback and Reviews:** Maintain a 4.5-star rating or higher on review platforms
- **Content Creation:** Expand content publication to one additional platform
- **Continuous Profit Donation:** Make donation to Givewell for 5% of annual profits
- **Sponsorships and Partnerships:** Secure four major inbound and two major outbound sponsorships

Year 5 (2028)

Revenue Goal: 5m+ (30% growth rate YoY)

Growth KPIs:
- **Podcast Downloads:** Sustain monthly podcast downloads at 15,000
- **Email Subscriber List:** Grow the email subscriber list to 75,000
- **Instagram Follower Growth:** Reach 50,000+ Instagram followers
- **Collaborative In-Person Events:** Successfully host four in-person events
- **PR Initiatives:** Execute at least four of the planned PR initiatives (e.g., feature in international media, book deal, video series) during the year

Profit KPIs:
- **Tighten Profit Margins:** Achieve a XX% profit margin by year end
- **Revenue-Sharing Program:** Increase average revenue sharing income to $XXXX per client per month
- **Streamlined Admin Tasks:** Reduce the time spent on administrative work by XX%
- **Process Management Integration:** Achieve a XX% increase in operational efficiency.
- **Brand Awareness Initiatives:** Increase brand recognition by XX%

Impact KPIs:
- **Scaling School Quality Improvement:** Expand Scaling School content and maintain average customer satisfaction rating of 4.5 out of 5
- **Customer Feedback and Reviews:** Maintain a 4.5-star rating or higher on review platforms
- **Content Creation:** Expand content publication to one additional platform
- **Continuous Profit Donation:** Make donation to Givewell for 5% of annual profits
- **Sponsorships and Partnerships:** Secure four major inbound and two major outbound sponsorships

Easy Scaling Actionables

Year 0 (2023) Action Plan

Growth KPIs:

Product Suite:
- **Goal:** Finalize offers and sales goals for 2024
- **Actionables:**
  - Map out capacity for current and potential offers
  - Set sales goals for each offer based on capacity

Podcast Downloads:
- **Goal:** Increase monthly podcast downloads to 2,000
- **Actionables:**
  - Maintain lead time between recording and publication of at least 4 weeks
  - Maintain at least 2 week lead time between guest notification and publication
  - Promote each episode via email, Instagram and engage with listeners.
  - Test additional episode types and review metrics
  - Update review request process and integrate feedback request
  - Identify additional opportunities to promote, i.e., LinkedIn or Facebook groups
  - Plan targeted Facebook and Instagram ad campaigns to acquire downloads

Email Subscriber List:
- **Goal:** Grow the email subscriber list to 10,000
- **Actionables:**
  - Launch BSAT assessment as freebie funnel to Scaling School
  - Run targeted Facebook and Instagram ad campaigns to acquire leads
  - Leverage existing network and affiliates to promote sign-ups

Instagram Follower Growth:
- **Goal:** Reach 4,000+ Instagram followers
- **Actionables:**
  - Organize current and past content for easy repurposing
  - Leverage existing team to post social content 3-5 times per week and use relevant hashtags and engage with followers' comments

Collaborative In-Person Events:
- **Goal:** Start initial planning of one in-person event to take place in 2024
- **Actionables:**
  - Brainstorm event types and what makes sense for our initial event
  - Identify potential locations and settle on timeframe

PR Initiatives:
- **Goal:** Map out small, medium, and large PR initiatives for 2023 and 2024 and design implementation plan for each
- **Actionables:**
    - Work with Karen to develop a podcast guesting pitch list and pitch plan
        - Create a templated pitch for team to submit on behalf of Jordan
        - Set specific goal for podcast guest interviews (i.e. 3-5 per month)
    - Create content calendar for 2024 press releases with planned milestones
    - Start building a list of media outlets and contacts for future outreach
    - Work with Alison to identify high visibility award opportunities for 2023/24
    - Identify potential outlets for thought leadership articles
    - Prepare the groundwork for executing PR initiatives in Year 1
    - Consider Paid PR sponsorship opportunities for increased reach

Profit KPIs:

Tighten Profit Margins:
- **Goal:** Set target profit margin and other financial goals
- **Actionables:**
    - Complete setup and onboarding with new CFO
    - Work with CFO to finalize projects and set goals and benchmarks for 2023 and 2024
        - XX% pretax profit
        - XX days cash on hand
        - Etc…

Revenue-Sharing Program:
- **Goal:** Refine client requirements for participation
- **Actionables:**
    - TBD

Optimize Organizational Efficiency + Effectiveness:
- **Goal:** Audit and adjust company org chart and individual roles and responsibilities
- **Actionables:**
    - Update organizational chart to align with Easy Scaling's growth trajectory
    - Revise all current and upcoming job descriptions
    - Ensure all current and upcoming administrative tasks are assigned to existing team members, where possible
    - Identify short, medium, and long-term hiring needs
    - Explore opportunities to streamline, cut, or automate current admin tasks
    - Hire full-time client manager/operations manager hybrid role
    - Explore retirement plan option for all employees

Passive Product Funnel

- **Goals:** Promote annual planning digital product all of December and January + Roll out evergreen funnel for Scaling School
- **Actionables:**
  - Audit and update annual planning sales page
  - Audit and update planning offers/products for upsells
  - Audit, update, and publish ads for annual planning templates
  - Finalize and run ads for B-SAT funnel for Scaling School offer

Impact KPIs:

Scaling School Quality Improvement:
- **Goal:** Finalize Scaling School delivery and client support process and achieve average customer satisfaction rating of 4.0 out of 5 on year end survey
- **Actionables:**
  - Launch a quarterly feedback survey for students
  - Incorporate initial feedback into new advising process, call schedule, professor support expectations, and curriculum
  - Finalize and roll out automated onboarding process for new students

Customer Feedback and Reviews:
- **Goal:** Develop process for client testimonial use across programs
- **Actionables:**
  - Develop and implement a system for tracking testimonials/kind words across all programs
  - Brainstorm creative ideas for using testimonials
  - Develop and implement a process for using/updating testimonials across website, social, etc

Content Creation:
- **Goal:** Improve in-house content creation process for maximum efficiency, impact, frequency, and consistency across all platforms
- **Actionables:**
  - Define content goals, target audience, and key performance indicators (KPIs)
  - Determine the messaging, tone, and style that align with Easy Scaling brand
  - Create content calendar for the next 3 months (Quarterly Content Planning)
  - Implement a content management system (CMS) in ClickUp

Continuous Profit Donation:
- **Goal:** Make donation to Givewell for 1% of annual profits
- **Actionables:**
  - Coordinate with CFO on donation schedule/timeline
  - Publicly announce each donation
  - Engage with the audience to explain the chosen cause and encourage involvement

Year 1 (2024) Action Plan

Growth KPIs:

Podcast Downloads:
- **Goal:** Increase monthly podcast downloads to 5,000
- **Actionables:**
  - Produce and publish 2 high-quality podcast episodes per month
  - Promote each episode on social media platforms and engage with listeners
  - Collaborate with at least 2 industry influencers for guest appearances
  - Host 2 Q&A sessions with the podcast audience during the year
  - Roll out high performing episode types/series from testing process
  - Plan anniversary relaunch event in July or August

Email Subscriber List:
- **Goal:** Grow the email subscriber list to 25,000
- **Actionables:**
  - Continue running and optimizing targeted Facebook and Instagram ad campaigns to acquire sign ups for the B-SAT
  - Optimize website landing pages and CTAs for conversion
  - Leverage existing network connections to promote sign ups for the B-SAT
  - Launch 1+ new lead magnet to continue expanding email list

Instagram Follower Growth:
- **Goal:** Reach 10,000+ Instagram followers
- **Actionables:**
  - Hire SMM/SM team to build full strategy
  - Post engaging content on Instagram 3-5 times a week
  - Use relevant hashtags and engage with followers' comments and messages
  - Collaborate with 2 other Instagram influencers for shout-outs
  - Run 2 follower acquisition campaigns

Collaborative In-Person Events:
- **Goal:** Successfully host one in-person event
- **Actionables:**
  - Plan and host 2 in-person or online events with clear objectives and engaging content
  - Promote events through social media, email marketing, and partnerships
  - Collect feedback from attendees to improve future events

PR Initiatives:
- **Goal:** Execute at least two of the planned PR initiatives (e.g., press releases, media outreach) during the year
- **Actionables:**

- Develop a content calendar for press releases with planned milestones
- Start building a list of media outlets and contacts for future outreach
- Begin researching and drafting award applications and thought leadership articles
- Prepare the groundwork for executing PR initiatives in Year 2

Profit KPIs:

Tighten Profit Margins:
- **Goal:** Achieve a XX% profit margin by year end
- **Actionables:**
  - Conduct a thorough expense review in the first quarter and identify cost-saving opportunities
  - Monitor marketing ROI and adjust strategies for cost-effectiveness
  - Explore supplier negotiation opportunities and cost-cutting measures (think gifting, sweatshirts, etc.)
  - Implement basic financial management practices
  - Expand focus on affiliate revenue

Revenue-Sharing Program:
- **Goal:** Increase average revenue sharing income to $XXXX per client per month
- **Actionables:**
  - Finalize and implement guidelines for revenue-sharing participation

Streamlined Admin Tasks:
- **Goal:** Reduce the time spent on administrative work by 10%.
- **Actionables:**
  - Delegate administrative tasks to existing team members, where possible
  - Research and plan the hiring of administrative support for later in the year
  - Develop hours tracking interface for admin work across all team members to identify areas for improvement
  - Begin exploring automation tools and software for admin tasks
  - Set long term goals for reduction in administrative work

Process Management Integration:
- **Goal:** Achieve a 10% increase in operational efficiency
- **Actionables:**
  - Start researching current process management software solutions
  - Develop a process and organizational system for SOP updating
  - Identify key processes that could benefit from automation
  - Begin training team members on process improvements
  - Set long term goals for efficiency improvements

Brand Awareness Initiatives:
- **Goal:** Increase brand recognition by 10%

- **Actionables:**
  - Develop brand awareness metrics dashboard
  - Set long term goals for improvement in all metrics
  - Launch a targeted marketing campaign on social media and relevant platforms
  - Maintain consistent brand messaging and visuals across all communication channels

Impact KPIs:

Scaling School Quality Improvement:
- **Goal:** Improve the quality of Scaling School content and achieve average customer satisfaction rating of 4.2 out of 5
- **Actionables:**
  - Conduct a comprehensive curriculum review and update as needed
  - Launch a feedback survey for students after each course
  - Expand professor roster
  - Increase number of calls with professors and team
  - Monitor effectiveness of advising process and optimize as needed

Customer Feedback and Reviews:
- **Goal:** Roll out a coordinated effort for requesting feedback across offers and seeking public reviews on key platforms
- **Actionables:**
  - Create universal customer feedback survey to collect insights and suggestions across platforms
  - Establish a system for tracking and addressing customer inquiries and issues
  - Encourage satisfied clients to leave reviews on relevant platforms

Content Creation:
- **Goal:** Expand content publication to one additional platform
- **Actionables:**
  - Start posting/migrating to Easy Scaling social (instead of JSK social)
  - Monitor content performance using analytics tools to understand what works and what doesn't
  - Use data to refine content strategy and adjust the calendar accordingly
  - Develop a promotion strategy for paid content, advertising, etc

Continuous Profit Donation:
- **Goal:** Make donation to Givewell for 2% of annual profits
- **Actionables:**
  - Allocate 1% of quarterly profits to a charitable cause and publicly announce each donation
  - Engage with the audience to explain the chosen cause and encourage involvement

Sponsorship and Partnerships:
- **Goal:** Secure one major inbound and one major outbound sponsorship
- **Actionables:**
    - Identify potential partners aligned with Easy Scaling's values and mission
    - Create a list of target sponsors and partners
    - Craft a compelling sponsorship proposal and outreach plan
    - Initiate discussions and negotiations with potential sponsors and partners

**Year 1 actionables provide a detailed plan to start achieving the set KPIs while laying the foundation for long-term growth, profitability, customer satisfaction, and brand recognition. Some of the actionables are already in the works, but keeping them within this plan helps continue their trajectory.