

SETTING OUT A STRATEGIC ROADMAP FOR GROWTH

8

Steps you can take in the next 12 months

1

Focus on financial planning, securing growth capital and identifying what people you need on your team. Plan when and who you'll hire, and map out what technology you'll need.

2

Start to automate your core processes, expand your team and prepare operations for increased demand. Start to use CRM, project management and marketing automation tools.

3

Focus on bringing in new customers and finding new markets. Test your product or service in new places or with new people. Increase marketing efforts and streamline your supply chain.

Tools to help you plan and execute your scaling strategy

To scale your business smoothly, make use of the right digital tools to make your processes easier and tackle the challenges of growing. Here's a list of tools and templates to help you as you grow. Make sure you explore other options too, to find out what works for your business.

Communication

[Zoom](#)

Host meetings online to keep your team connected.

[Slack](#)

A messaging, calling and document sharing platform for your team to stay in touch instantly.

[Microsoft Teams](#)

For an integrated chat feature, meetings and file storage.

Project management

[Asana](#)

Manage tasks, and track timelines and projects.

[Trello](#)

Manage projects using boards and cards to track progress.

[Monday.com](#)

Excellent for managing larger teams and projects as your business grows. Keep track of deadlines and documents with ease.

CRM

[Salesforce](#)

A powerful CRM tool that helps you scale customer relationships and manage complex sales pipelines.

[HubSpot](#)

Includes marketing automation, sales management and customer service features, ideal for scaling businesses.

[Zoho CRM](#)

A more affordable CRM tool with automation features for lead management and customer engagement.

Growth roadmap templates

[Business roadmap template](#)

Visualise your scaling goals and strategic initiatives over a 12- to 18-month period.

[Scaling strategy outline](#)

Structured templates that outline each step of your business growth, including key milestones, resources and financial projections.

HR and payroll

[BrightHR](#)

HR, health and safety and payroll solutions.

[myhrtoolkit](#)

Easy to use HR management tools.

Employee development

[Santander Open Academy](#)

Our e-learning and training platform for professional development.

Marketing automation

[Mailchimp](#)

Automates email marketing and customer engagement.

[Hootsuite](#)

Helps to manage and scale social media efforts across multiple platforms.

[ActiveCampaign](#)

Combines email marketing, automation and CRM.

Performance dashboards

[Google Data Studio](#)

Lets you visualise and track business metrics in real time, such as your sales, marketing performance and customer retention.

[Tableau](#)

Offers detailed data visualisation to help identify trends and opportunities during business growth.

Risk management templates

[Risk assessment templates](#)

Available through tools like [Smartsheet](#). These help you identify and plan for potential risks during scaling.

[Contingency planning tools](#)

Develop backup plans using templates available through sites like [Lucidchart](#). These can help you to map out alternative strategies.

Business insurance and energy

[AXA](#)

Offers business insurance to help protect against financial losses.

[Hiscox UK](#)

Offers business insurance to help protect against financial losses.

[Bionic](#)

Compare, switch and renew your business energy and broadband.

[Business Energy Comparison](#)

Compare business energy prices from multiple suppliers.