PROJECT UNDERDOGS FOUNDER LIBRARY · GROWING AND SCALING · G-13

GROWTH PLAN TEMPLATE

A fillable 12-to-24-month growth plan with goals, initiatives, costs and quarterly milestones.

TYPE: TEMPLATE REVIEWED: NOVEMBER 2026 TIME: 1 TO 2 HOURS LEVEL: INTERMEDIATE

AT A GLANCE

- Page 2 sets your **direction**: where you are today, where you want to be, and your growth path.
- Page 3 lists your **growth initiatives** with costs, owners and quarterly milestones, and totals the costs.
- Use it with your mentors, your team, and investors. See **G-10 Raising a Bigger Round**.

How to fill it in

1. **Where you are today**: sales, profit, customers, team and locations. Use real numbers.
2. **Where you want to be** in 12 to 24 months, with numbers.
3. **Choose your growth path**: more of the same, new products, new locations, new customers or a mix. See **G-02 Knowing When You're Ready to Grow**.
4. **List 3 to 6 initiatives** that will get you there, each with a cost, an owner and an expected result.
5. **Set quarterly milestones** so you can track progress.
6. **Check your cash**: does your cash forecast cover the costs? See **G-11 Growing Without Running Out of Cash**.
7. **Review it every quarter** and update it.

Example initiatives

Initiative	Cost	Owner	Expected result
Hire a general manager	$65,000 a year	Founder	Founder freed for growth work
Open second location	$250,000	Founder and GM	+$500,000 sales in year 2
Launch catering	$15,000	Kitchen manager	+$8,000 sales a month
Move to online ordering	$6,000	GM	+10% average order

TIP

Fewer, well-funded initiatives usually beat many small ones. If an initiative doesn't have an owner, it probably won't happen.

> TIP
>
> Calculations work in **Adobe Acrobat Reader** (free) and most desktop PDF apps.

Where to go next

- **G-02 Knowing When You're Ready to Grow**
- **G-11 Growing Without Running Out of Cash**
- **R-25 Use-of-Funds Plan**

IMPORTANT
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GROWTH PLAN: DIRECTION

Where you are, where you're going, and how you'll get there.

Plan period (for example, Jan 2027 to Dec 2028)	

	Today	Goal
Yearly sales		
Yearly profit (or EBITDA)		
Customers		
Team size		
Locations or markets		
Sales growth needed (%)		

Your growth path, and why

Biggest risks, and how you'll handle them

What you need: money, people, systems

How you'll fund it (see G-11)

GROWTH PLAN: INITIATIVES AND MILESTONES

3 to 6 initiatives, each with a cost, an owner and quarterly milestones.

	Initiative	Cost	Owner	Expected result
1				
2				
3				
4				
5				
6				
Total				

Quarterly milestones

	Milestones
Quarter 1	
Quarter 2	
Quarter 3	
Quarter 4	
Quarter 5	
Quarter 6	
Quarter 7	
Quarter 8	