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For Growth-Stage B2B and B2C Tech Companies

A diagnostic tool to assess, align, and accelerate your company's readiness for acquisition or investment.

Growing a tech company takes more than a great product or funding. It takes the right foundations to scale without breaking.

These seven categories are shaped by lessons from high-growth startups and operators like Paul Graham, Dan Martell, Jason Lemkin, and David Sacks.

From product-market fit to data-driven decision-making, the 7 categories capture the shifts every startup must make: from founder-led to team-led, from gut feel to metrics, from hustle to systems.

Whether you're pre-Series A or preparing for exit, this tool helps you benchmark where you are, and what needs to evolve across the levers that matter most: product, revenue, execution, leadership, systems, financial readiness, and brand.

[MATURITY LEVELS]

Each category is scored from 1 to 3 points.
With 7 categories, total scores will range from 7 to 21.

Level 1 = 1 point │ Level 2 = 2 points │ Level 3 = 3 points

Total Score	Maturity Stage	Description
7-10	Reactive	Still in survival mode. Reactive, founder-reliant, and messy. Time to build structure and focus.
11-15	Structured	Starting to delegate, track what matters, and reduce chaos. Growth is forming but not predictable.
16-21	Optimized	Strong foundation, clear ownership, and repeatable systems. Ready to scale with intention.

[1]

Product and Customer Fit

Reactive (Level 1) ☐
The product is still evolving. Customer feedback is inconsistent, and there is no clear
understanding of who the ideal customer is or why they buy.

- Less than 50 percent of new users are retained after 3 months.

- No formal ICP or target persona.

- Feedback is reactive and unstructured.

Structured (Level 2) ☐
You're starting to understand what works. Early traction and customer signals help guide
development, but retention and fit are not yet consistent.

- ICP is defined and used to guide sales and marketing.

- Retention exceeds 60 percent after 3 or 6 months.

- At least 10 structured interviews or surveys conducted in the last 6 months.

Optimized (Level 3) ☐
You've got product-market fit. The product is sticky, your ideal customer is well defined,
and feedback loops are built into your product roadmap.

- Over 80 percent of top customers renew, expand, or refer.

- ICP is tied to LTV, CAC, and CSAT data.

- Feedback drives 75 percent or more of product roadmap updates.

[2]

Tech Stack and Engineering Maturity

Reactive (Level 1)
☐
Engineering is reactive. Releases are slow or buggy, and the system depends heavily
on a few individuals.

- Releases are inconsistent and often delayed.

- Little to no test coverage or documentation.

- Less than 30 percent of codebase is documented.

Structured (Level 2)
☐
Development velocity is improving. Sprints are more consistent, and systems are
becoming more predictable and maintainable.

- Two-week sprint cycles with more than 60 percent on-time delivery.

- 40 to 60 percent test coverage with CI or CD for core features.

- Backlog is actively managed weekly.

Optimized (Level 3)
☐
Engineering is a strength. Your systems are reliable, scalable, and your team
can deliver consistently without burning out.

- Weekly deploys with less than 5 percent rollback rate.

- Over 60 percent test coverage with full automation.

- Technical debt is reviewed and prioritized quarterly.

[3]

Revenue Engine

Reactive (Level 1)

Sales efforts are founder-led and inconsistent. There's no repeatable motion or clear understanding of funnel performance.

- Founder closes over 80 percent of all deals.

- No CRM or funnel reporting.

- Pricing varies between customers.

Structured (Level 2)

You've built an early sales engine. Tools are in place, and there's some predictability in lead generation and conversion.

- Less than 50 percent of deals are founder-led.

- CRM in use with over 60 percent deal tracking accuracy.

- Standard pricing and proposal templates used in most deals.

Optimized (Level 3)

Sales is now a repeatable process. Roles, metrics, and systems are in place to support predictable growth and scale.

- Sales team closes over 80 percent of deals.

- Funnel metrics like CAC and payback are tracked weekly.

- Win rate over 25 percent and average deal size is increasing.

[4]

Data, Automation and Systems

Reactive (Level 1)
Work is manual and systems are disconnected. Visibility is low, and key data often lives in spreadsheets.

- Reporting is built manually, often delayed and error-prone.

- Tools are used in isolation, and key platforms like CRM, finance, and support don't talk to each other.

- There is no central dashboard or real-time view of business performance.

Structured (Level 2)
Core systems are starting to connect. Automations are in place, and key metrics are reviewed regularly.

- Some core tools are integrated, reducing duplicate work and improving visibility.

- Routine tasks like invoicing, reminders, or onboarding sequences are partially automated.

- Dashboards are used to track key metrics and are reviewed by leadership on a regular basis.

Optimized (Level 3)
You've built a data-driven culture. Tools are integrated, reporting is proactive, and systems support scale without adding complexity.

- Most tools are connected to a central dashboard or reporting platform that supports better decision-making.

- Teams rely on workflow automation to streamline updates, alerts, and approvals across departments.

- Leaders regularly use data to anticipate issues, adjust course, and plan with confidence.

[5]

Funding and Strategic Readiness

Reactive (Level 1)

The business is running without a clear financial plan. Runway is short and strategy is reactive.

- Runway under 6 months and no reliable forecast.

- No investor reporting or data room.

- No documented 1-year or 3-year plan.

Structured (Level 2)

You've established financial visibility. Planning cycles and forecasting are becoming routine.

- Runway between 6 to 12 months with cashflow forecasts.

- Basic financial model with base and stretch cases.

- 1-year plan documented and shared with team.

Optimized (Level 3)

You're thinking ahead. Financials, OKRs, and strategy are fully aligned and support investor readiness or scale.

- Runway over 12 months or path to profitability.

- Forecasts updated quarterly and used for planning.

- 3-year plan with OKRs cascaded across teams.

[6]

Brand, Positioning and Demand Generation

Reactive (Level 1)

There's no clear messaging or consistent brand story. Most leads come from referrals or the founder's network.

- Messaging is unclear or inconsistent.

- Leads come from referrals or founder outreach.

- No active SEO, content, or paid strategy.

Structured (Level 2)

Messaging is tightening. Inbound channels are forming and performance is being tracked.

- Clear messaging aligned to ICP across touchpoints.

- 25 to 50 percent of leads come from inbound sources.

- Marketing funnel tracked monthly from traffic to SQL.

Optimized (Level 3)

Your brand drives growth. You stand out in your space, and a strong marketing engine generates high quality leads.

- Brand has a strong category narrative.

- Over 50 percent of leads are inbound from organic, paid, or partner sources.

- CAC, LTV, and awareness metrics are reviewed quarterly.

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[7]

Talent & Culture

Reactive (Level 1)

Culture is undefined and varies across the team. Hiring is reactive, often based on urgency
or referrals.

- No shared values or performance standards; <25% of team roles have defined
  accountabilities.

- Onboarding is inconsistent or missing; new hires receive minimal structured
  support.

- Expectations are unclear; evaluations are infrequent or informal.

Structured (Level 2)

The company has started to formalize how it attracts, develops, and retains talent.

- Core values are documented and referenced in hiring and feedback;
  50–75% of roles have scorecards.

- Onboarding is standardized for most roles, with clear 30–60–90 expectations.

- Career paths and development plans exist for at least half of the team.

- Performance is evaluated at least twice per year using consistent criteria.

Optimized (Level 3)

Culture is a strategic asset that supports company growth and team retention.

- 90%+ of roles have defined scorecards, accountabilities, and growth paths.

- Onboarding includes peer support and role-specific training; tracked satisfaction scores.

- Culture and values are reinforced in team rhythms, recognition, and feedback loops.

- Regular evaluations (quarterly or ongoing) link individual performance to team outcomes
  and career progression