

Professional Services Scaling Scorecard

Purpose: Quickly assess operational and strategic risks in Professional Services as your company scales.

Instructions: Rate each area as high, medium, or low risk.

1-3: 🚨 Low preparedness, high risk: Your ability to scale is likely at risk. Prioritize improvements now.

4-7: ⚠️ Moderate preparedness, moderate risk: Some gaps to address. Focus on your lowest scores first.

8-10: ✅ High preparedness, low risk: You're set up for success. Keep reinforcing your strengths.

Area	Description	Score	Risk Level
Delivery & Customer Experience	Timelines keep pace; onboarding repeatable; customers satisfied		
Team & Talent	Roles clear; capacity manageable; career progression & upskilling in place		
Knowledge & Playbooks	Processes documented; templates/checklists; minimal rework		
Tools & Technology	Systems appropriate & consistently used; spreadsheets minimized		
Cross-Functional Alignment	PS collaborates with Sales, Product, CS; handoffs smooth		
Financial Health & Scale Economics	PS profitable/strategically positioned; scaling adds proportional value		
Process & Risk Management	Processes adaptable; risks anticipated; escalation paths clear		
Leadership & Culture	Sustainable delivery modeled; burnout monitored; intentional team culture		

If you scored 3 or below in more than 3 areas, your team's development is at risk. ClearWay Projects can help. Reach out to contact@clearwayprojects.com to schedule a readiness consult. Have actionable results in as little as one week.