SCALING SCORECARD™

The **Scaling Scorecard™** helps life science companies evaluate their scaling maturity across the 12 focus areas of the *Life Science Scaling Triangle™*. Each area is broken into key elements, which are rated on a scale from 1 to 5 offering a data-driven, structured way to identify both strengths and vulnerabilities.

This enables actionable conversations, strategic alignment, and prioritization of your scaling efforts.

How to Use It

Start by defining the scope of your review. While the full scorecard covers all 12 focus areas, we recommend selecting **1–3 areas** or a **specific theme** to keep the process focused and the insights manageable.

For initial prioritization, use the **Readiness Dashboard™** to identify which areas are most relevant to your company's current stage.

Each focus area includes:

Four key topics that reflect key scaling perspectives of the focus area

Three **guiding questions** per topic to support evaluation

A **1–5 scoring scale**:

1. **Initializing** – Minimal progress
2. **Growing** – Basic systems in place
3. **Building** – Consistent performance improvements
4. **Scaling** – Optimized and efficient operations
5. **Leading** – Mature and ready for next stage

You can apply this as a **self-assessment**, a **team exercise**, or a **boardroom dialogue starter**. Differences in scoring between reviewers are just as valuable as the scores themselves — they reveal alignment gaps and open up valuable conversations.

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PRODUCT

Finance

1.	Investability	Score (1-5)
1.1	How investable is the company; does it deliver on promised results, and are current investors happy about its progress?	
1.2	Is the company well known and respected in the ecosystem and are the executives referenceable?	
1.3	Is the executive leadership referenceable?	

2.	Cash Flow Management	Score (1-5)
2.1	Are financial systems integrated with other business systems (HR, ERP, CRM etc.) for seamless data flow?	
2.2	Are budgets being followed?	
2.3	Are financial systems integrated with other business systems (HR, ERP, CRM etc.) for seamless data flow?	

3.	Financial Reporting and Processes	Score (1-5)
3.1	To which degree are financial statements complete, prepared regularly, and without errors?	
3.2	Are KPIs in place to measure financial performance and health?	
3.3	Is the reporting set-up automated or semi-automated, improving reporting efficiency and reliability?	

4.	Strategic Role	Score (1-5)
4.1	Does the finance function play a central role in strategic decision making?	
4.2	Is the finance function proactively playing a role in business development with financial modeling?	
4.3	Is the financing function part of external fundraising efforts?	

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Clinic and Technology

5.	Product/Solution Maturity	Score (1-5)
5.1	Is the product on the market or soon to be launched?	
5.2	Are clinical results satisfactory or below expectations? Are there still teething problems?	
5.3	If training is required to start using the product/solution, has a training concept been developed and tested?	

6.	Partnerships and Collaboration	Score (1-5)
6.1	Does the company have effective strategies for collaboration with external partners, such as academic institutions, CROs, and technology providers, to enhance its R&D capabilities?	
6.2	Has the company engaged in strategic partnerships or licensing agreements?	
6.3	Is the company dependent on new, external partnerships to succeed and maintain traction?	

7.	R&D Planning and Projects	Score (1-5)
7.1	Are there standardized processes and workflows in place for managing R&D projects, including protocols for clinical trials and technology development?	
7.2	Is the R&D planning aligned with external (market) demands and drivers?	
7.3	Is the company applying best practice project management standards and overseeing the project portfolio proactively?	

8.	Innovation and Pipeline Management	Score (1-5)
8.1	How effectively is the company managing its R&D pipeline, from early-stage discovery to late-stage development, and fostering innovation within the team?	
8.2	Does the R&D team possess the necessary expertise and experience in clinical activities and/or technology development?	
8.3	Is there a plan for continuous skill development within R&D?	

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RA and QA

9.	**Bandwidth and Resource Allocation**	Score (1-5)
9.1	Does the RA and QA team(s) have sufficient resources, including personnel and budget, to handle the current workload and projected growth?	
9.2	How healthy is the balance between strategic business oversight and specialization in the RA and QA teams?	
9.3	Are there key performance indicators (KPIs) in place to measure the effectiveness and efficiency of RA and QA activities, and is there a culture of continuous improvement?	

10.	**Compliance and Audit Readiness**	Score (1-5)
10.1	How well prepared is the company for internal and external audits?	
10.2	Are there documented audit trails and evidence of continuous compliance?	
10.3	Is all necessary documentation up-to-date, easily accessible, and compliant with regulatory standards?	

11.	**Training and Competence Development**	Score (1-5)
11.1	Are there regular training programs for RA and QA staff to stay updated on regulatory changes and quality standards?	
11.2	Is the rest of the staff regularly exposed to relevant training in RA and QA matters?	
11.3	Are there processes in place to regularly review the necessary competency levels?	

12.	**Cross-Functional Collaboration**	Score (1-5)
12.1	How effectively does the RA and QA function collaborate with other departments such as R&D, manufacturing, and marketing?	
12.2	Are there well-defined processes and collaborative workflows for handling regulatory submissions, quality control, and compliance issues?	
12.3	Does cross-functional collaboration result in bottle-neck situations?	

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SCM and Operations

13.	Process Standardization and Efficiency	Score (1-5)
13.1	Are there efficient, standardized processes and workflows for procurement, production, inventory management, and distribution?	
13.2	Are there systems in place for evaluating and maintaining supplier quality and reliability?	
13.3	Does the company employ effective inventory management and demand planning strategies to balance supply and demand, minimize stockouts, and reduce excess inventory?	

14.	Sustainability Practices	Score (1-5)
14.1	To what extent has the company implemented sustainable practices such as reducing waste, minimizing energy consumption, and utilizing eco-friendly materials in its supply chain and operations?	
14.2	How effectively does the company engage with suppliers and vendors to ensure they adhere to environmental standards and practices?	
14.3	Does the company prioritize climate friendly procurement by selecting suppliers with strong environmental performance?	

15.	Technology Integration	Score (1-5)
15.1	Are digital technologies, such as ERP systems and WMS, integrated into the SCM and operations to streamline processes and improve visibility?	
15.2	Does the company proactively scout the market for new technologies to enhance efficiency and supply chain reliability?	
15.3	Is the responsibility for SCM technology integration placed at an operational or strategic level?	

16.	Risk Management and Contingency Planning	Score (1-5)
16.1	Does the company have risk management and contingency plans to address potential supply chain disruptions or operational failures?	
16.2	Is the company currently working with, or planning to implement, a dual supply setup?	
16.3	How well aligned is the company's risk management strategy with the overall business strategy?	

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MARKET

Strategy

17.   **Clarity, Alignment, and Adaptation**   **Score (1-5)**

17.1	How clearly defined are the company's mission and vision messages, and how well are they communicated across all levels of the organization?	
17.2	How frequently are the mission and vision reviewed and adapted to reflect changes in the market, technological advancements, and company growth?	
17.3	To what extent is the strategy, mission, and vision aligned with the board of directors?	

18.   **Strategic Planning and Development**   **Score (1-5)**

18.1	How well does the strategic planning process balance long-term objectives with short-term goals and operational needs?	
18.2	How inclusive and diverse is the strategy development process in terms of involving different departments and stakeholders?	
18.3	To what extent does the company utilize data, research, and market analysis in its strategy development process?	

19.   **Execution of the Strategy**   **Score (1-5)**

19.1	How effectively does the company allocate resources (e.g. financial, human, technological) to execute its strategy?	
19.2	How well is the strategy translated to the individual employees' daily tasks and departments' goals?	
19.3	How is feedback used to refine strategy?	

20.   **Performance Monitoring and Accountability**   **Score (1-5)**

20.1	Are there clearly defined KPIs and metrics in place to measure the success of strategic initiatives?	
20.2	How often are formal performance reviews conducted to assess progress against strategic objectives?	
20.3	What mechanisms are in place to ensure accountability for achieving strategic objectives at various levels of the organization?	

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Organization

21.	**Organizational Structure**	Score (1-5)
21.1	How clearly defined and communicated are the organizational structure and reporting lines?	
21.2	Are they aligned with the company's strategic objectives and growth stage?	
21.3	Is the organizational structure scalable and flexible enough to adapt to the company's growth and changing needs?	

22.	**Roles and Responsibilities**	Score (1-5)
22.1	Are job descriptions regularly updated to reflect changes in the company's needs?	
22.2	What processes are in place for the continuous development and evolution of roles as the company scales?	
22.3	How does the organization ensure that employees grow with their roles?	

23.	**Authority Shift**	Score (1-5)
23.1	Are decision-making processes transparent and efficient?	
23.2	To what extent are employees at different levels empowered to make decisions?	
23.3	How inclusive are the decision-making processes?	

24.	**Workflows**	Score (1-5)
24.1	Are workflows standardized and efficient across the organization?	
24.2	How often are workflows reviewed and optimized? How effectively do workflows facilitate cross-functional collaboration and communication?	
24.3	Are there mechanisms in place to address workflow bottlenecks and improve inter-departmental coordination?	

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Commercialization

25.	**Market Access**	**Score (1-5)**
25.1	How well-defined and comprehensive is the market access strategy, including pricing and reimbursement?	
25.2	How regularly is it reviewed and updated to reflect changes in the market and regulatory environment?	
25.3	How effectively does the company engage with key stakeholders, such as payers, healthcare providers, and regulatory bodies, to facilitate market access and reimbursement?	

26.	**Revenue Generation**	**Score (1-5)**
26.1	How well-developed is the sales organization in terms of structure, training, and experience?	
26.2	Are there clear metrics for performance evaluation and growth?	
26.3	How well-aligned is the sales strategy with overall business objectives?	

27.	**Customer Success**	**Score (1-5)**
27.1	How comprehensive and proactive is the customer success framework?	
27.2	How effectively does the company handle customer feedback in compliance with regulatory requirements?	
27.3	Are there systems, dedicated resources and processes in place to capture, analyze, and act on feedback to improve products and services?	

28.	**Handling Feedback from the Market**	**Score (1-5)**
28.1	Are there regular audits and updates to processes to maintain compliance?	
28.2	How effectively is the CRM system integrated into the company's operations?	
28.3	Does it provide comprehensive insights and data to support sales, customer success, and compliance efforts?	

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International Expansion

29.	Prioritization and Selection of Countries/Markets	Score (1-5)
29.1	How well are criteria to prioritize and select countries for market entry aligned with the company's strategic objectives and regulatory considerations?	
29.2	How comprehensive is the company's analysis of the regulatory landscape in target countries?	
29.3	Are there clear plans for navigating regulatory requirements and obtaining necessary approvals?	

30.	Optimization of Business Model	Score (1-5)
30.1	How well are criteria for prioritizing new markets aligned with the company's strategic objectives and regulatory considerations?	
30.2	Are there clear and comprehensive plans for navigating regulatory requirements and obtaining necessary approvals?	
30.3	How has the company adapted its value proposition to meet the specific needs and preferences of customers in each target market?	

31.	Handling Cultural Differences	Score (1-5)
31.1	How well does the company understand and address cultural differences in target markets?	
31.2	What training and development programs are provided to employees to enhance their cultural competence and ability to work effectively in diverse environments?	
31.3	What processes are in place for onboarding and integrating foreign employees into the local workforce and making them feel included?	

32.	HQ and Foreign Operations Integration	Score (1-5)
32.1	What communication mechanisms are in place to ensure alignment and smooth operations?	
32.2	To what extent are local teams empowered to make decisions?	
32.3	How does the company balance centralized control with local autonomy?	

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PEOPLE

Team

33.	Executive Leadership Team Dynamics	Score (1-5)
33.1	How cohesive is the executive leadership team?	
33.2	Are there regular meetings and effective communication channels that foster collaboration and alignment on strategic goals?	
33.3	Does the executive leadership team possess a diverse range of expertise relevant to the company's goals and challenges, particularly within the life sciences field, and are all relevant archetypes represented?	

34.	Board and Executive Leadership Team Relationships	Score (1-5)
34.1	How strong is the trust between the board and the executive leadership team?	
34.2	Are there processes in place for regular, transparent dialogue?	
34.3	Are the roles and responsibilities between the board and the executive leadership team clearly defined and mutually understood?	

35.	Specialization and Expertise in Life Sciences	Score (1-5)
35.1	What opportunities exist for professional development and specialization within the company, not only in life sciences disciplines, but also within operations and business services?	
35.2	How well-balanced is the team in terms of skills, expertise, and diversity?	
35.3	Are there regular assessments to identify and address skill gaps?	

36.	Talent Acquisition, Onboarding and Retention	Score (1-5)
36.1	How effective is the company's talent acquisition strategy in attracting high-caliber professionals with relevant life sciences expertise?	
36.2	Does the onboarding process effectively integrate new hires into the company culture and equip them with the necessary tools and knowledge?	
36.3	How does the company address feedback and foster a positive and psychologically safe work environment?	

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Leadership

37.	**Stakeholder Value**	Score (1-5)
37.1	How effectively does the leadership team engage with key stakeholders, including investors, customers, employees, and regulatory bodies, to understand and address their needs and expectations?	
37.2	How clearly and consistently does the leadership communicate the company's value proposition to stakeholders?	
37.3	Is there a coherent strategy for conveying the company's mission, vision, and achievements?	

38.	**Decision Making**	Score (1-5)
38.1	To what extent does the leadership team rely on data and analytics to inform decision-making?	
38.2	How inclusive and diverse are the decision-making processes within the leadership team?	
38.3	Are different perspectives and expertise considered in making strategic decisions?	

39.	**Efficient Execution**	Score (1-5)
39.1	Are there clear plans, timelines, and accountability mechanisms in place?	
39.2	How efficiently does the leadership team allocate resources (financial, human, and technological), to support strategic goals and operational needs?	
39.3	What programs are available for developing leadership skills within the organization?	

40.	**Good Governance**	Score (1-5)
40.1	How well-established are the governance structures within the company?	
40.2	How committed is the executive leadership team to ethical practices and compliance with regulatory requirements?	
40.3	Are there comprehensive risk management processes integrated into strategic planning and execution?	

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Systems and Communication

41.	IT Systems	Score (1-5)
41.1	Do IT systems support seamless data flow and interoperability across different functions and departments?	
41.2	Are they scalable and flexible enough to support the company's growth and evolving needs such as data privacy and documentation?	
41.3	Are there regular audits and updates to address emerging threats and regulatory requirements?	

42.	Internal Communication	Score (1-5)
42.1	How effective are the communication tools and platforms used for internal communication and collaboration?	
42.2	Are there specific initiatives or tools to enhance inter-departmental communication and teamwork?	
42.3	Is the internal communication perceived as transparent and timely?	

43.	Knowledge Sharing	Score (1-5)
43.1	What systems are in place for knowledge management and sharing?	
43.2	How accessible and user-friendly are these systems for all employees?	
43.3	How frequently are training and development programs conducted to enhance employees' skills in using IT and communication tools effectively?	

44.	Meeting Discipline	Score (1-5)
44.1	How structured and efficient are the company's meetings?	
44.2	Are there clear agendas, time management practices, and follow-up mechanisms in place?	
44.3	Are the tools and technologies used for virtual collaboration effective and reliable?	

Scaling Life Sciences

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Culture

45.	**Shared Values and Behavior**	Score (1-5)
45.1	How clearly are the company's core values defined and communicated across all levels of the organization?	
45.2	To what extent do employees exhibit behaviors that align with the company's values?	
45.3	Are there strategies in place to ensure that the culture evolves without losing its core entrepreneurial spirit?	

46.	**Diversity and inclusion**	Score (1-5)
46.1	How well does the company measure and promote diversity and inclusion efforts?	
46.2	How inclusive is the company culture in terms of integrating diverse perspectives and ensuring that all employees feel valued and respected?	
46.3	Are managers inclusive leaders and are they trained or inspired to be?	

47.	**Social events**	Score (1-5)
47.1	How frequently does the company organize in-person events and social activities to foster team cohesion and employee engagement?	
47.2	How well are these events attended and valued by employees?	
47.3	How effectively do company events and activities integrate new employees and promote a sense of belonging and cultural integration as well as inclusivity?	

48.	**Sense of Ownership**	Score (1-5)
48.1	Are there opportunities for employees to contribute to decision-making processes and company initiatives?	
48.2	How effectively does the company encourage and incorporate employee feedback?	
48.3	Are leaders seen as role models who embody the company's values?	