The UP-scale Discovery Tool

Want to *really* test where you are strong today and where your gaps could be as you scale up at pace?

Take a deep dive into the 16 themes and 120 curious questions that come together to drive:

1. FOCUS and PRODUCTIVITY
2. ENERGY and PERFORMANCE
3. BELONGING and CONNECTION
4. HIRING and RETAINING TALENT

The tool is best suited to businesses with 80-100+ people with plans to scale rapidly. Though it's never to late to start thinking about what comes next.

It goes without saying that there are many factors that will influence where you could lean in and lean out. Your focus will depend on your specific circumstances, stage of growth and strategy.

You can't do it all. No scaling business has the bandwidth to be great at everything – you will have to make conscious choices around where you need to be great vs. good enough.

To get the best from the tool, figure out where to focus and how to get there, get in touch with me caroline@up-scale.co.uk and I can help you.

I'd also welcome your ideas to improve the tool. My plan is to automate it too.

Theme	Statement	1= Strongly disagree 2 = Disagree 3 = Neither agree nor disagree 4 = Agree 5 = Strongly agree
Vision and purpose	The business Vision sets out the ultimate aspiration for business and what will be different in the market / world, in a way that captures colleagues' hearts and minds.	
	The business Purpose sets out the reason the business exists (the WHY) and helps colleagues to connect their own personal purpose to the business purpose.	
	There is a North Star Metric that tracks 'the value delivered to customers and causes revenue' that leaders and colleagues can use to make decisions on where they should focus their time and energy.	
Strategy and OKRs	The strategy sets out how the business will achieve the vision and deliver on the mission in a way that is clear for leaders and colleagues to understand.	
	The organisation-level OKRs are deeply aligned to the strategy and it's clear how the key results improve the North Star Metric.	
	The team-level OKRs ladder up to the org-level OKRs and only focus on 'where we need to be great' to achieve these (not where we need to be good enough).	
	Individual-level goals ladder up to Team OKRs.	
	Individual-level goals are SMART (specific, measurable, achievable, realistic, timebound).	
	Team level OKRs and Individual Goals are reviewed and refreshed in a rhythm e.g. quarterly	
	OKR and goal setting is explicit about 'what we will stop doing / do differently' to focus on delivery of the things that will move the dial (the NO-KRs)	
	Plans to deliver the OKRs also take account of the 'unhappy path' where the things that could stop the OKRs being achieved have been considered and taken into account in planning.	
	The members of the CxO team are clear on which goals are shared by the CxO team and which are individual goals.	
Org design	The shape of the organisation enables collaboration and minimises bottlenecks to 'get to done' at pace.	
	The shape of the organisation is nimble and can flex to enable the delivery of the OKRs.	
	The shape of the organisation is designed to be cost-effective and achieve payback in required time period.	
	The shape of the organisation is scalable.	
	Decisions on the org shape, job design and hiring take into account different ways of resourcing beyond adding heads e.g. AI, automation, outsourcing, flexible resource models.	
	The trade-off and choices between required skill-level and affordable levels of pay are reviewed in line with OKRs.	
	There is a clear understanding of the jobs that require a higher degree of autonomy and those that need a higher degree of direction.	

Leadership capability	Leaders have the know-how and tools to lead their people through rapid change.	
	Leaders have the capability to lead in a way that simultaneously pushes their people (hard conversations) and pulls their people (human conversations).	
	Leaders are capable performance coaches.	
	Leaders create an environment of psychological safety in their teams, where colleagues can speak up and share ideas without the fear of reprisal.	
	Colleagues know who their leaders are as people, what they stand for and their stories.	
	Leaders create a sense of belonging and connection in their teams.	
	The CxO team individually and collectively inspire belief in the vision.	
	Leaders are open to challenge, encourage curious questions and ask for dissenting views.	
	Leaders have tools and ways to take the temperature and gauge trust and engagement of their teams.	
	Leaders know how to (re)build the trust of their teams.	
	If you are a leader, your performance is also measured by your leadership capability and culture of your team.	
	Colleagues can 'knock on the door' of anyone at the top of the organisation.	
	Leaders are visible in the organisation, not just in their own function.	
	Colleagues hear regularly from their leaders and can put questions to their leaders in open forums.	
	Leaders are willing to be vulnerable with their people, show empathy and focus on learning rather than stigmatising errors.	
	Leaders have the know how and skill to delegate effectively within their teams.	
	Leaders are close enough to the workloads of their teams to make informed decisions on how work should be distributed.	
Capability	Job profiles set out the T shape capabilities and experience required for performance in the role (Deep T are the specialist skills and Broad T are the more generic skills like problem solving, collaboration).	
	Colleagues have the knowledge, skills and experience to be able to meet the goals they are set (i.e. the skill and knowledge doesn't just sit with a few).	
	Colleagues have access to on-demand learning to improve their skills in critical areas.	

Teaming and collaboration	Teams are clear on their individual goals and team-level OKRs.	
	The critical touchpoints and batton passes between teams are clear and understood.	
	Teams have the know-how to ensure conflict stays healthy and doesn't become unhealthy.	
	Team members support and coach each other to achieve the overall team goal.	
	Team meetings are effective - where there is a balance between execution and learning.	
	Teams take collective accountability for their performance.	
Ways of working	The business has a standard framework(s) that is used for problem solving (e.g. the 5 whys)	
	Decision making mechanisms mean the right decisions are made at pace, most of the time.	
	There is sufficient data available to make data-led decisions most of the time.	
	Decisions and problem solving regularly happen outside of formal meeting cadences, to 'get to done' at pace.	
	When decisions are made, the CxO team and leaders stick to them when out of the room.	
	Decisions are transparent and align to values. When decisions don't align with values, colleagues understand why.	
	Retrospectives are used to drive continual learning, improvements and efficiencies.	
	Process and standards are sufficiently documented and updated to reduce re-work, duplication and re-learning of lessons already learned.	
	Colleagues have the know-how to work in more productive ways to improve their effectiveness and productivity.	
	AI is used to help colleagues get work done faster / more effectively.	
	Colleagues have access to tools to get work done faster.	
	Agile / other methodologies are used to drive effective ways of working.	

Category	Statement	
Remote work and Communication	Colleagues have tools that support virtual communication and collaboration.	
	Leaders have the tools and skills to help their team communicate effectively in a remote work environment.	
	Leaders have the tools and skills to facilitate remote meetings for optimum effectiveness.	
	There are virtual spaces where teams and the whole organisation can come together to connect and be social.	
	The vision, strategy, OKRs (progress towards) and values are key features of communication with colleagues.	
	There is a regular 'all-colleague' forum(s) that brings everyone together and gives colleagues the opportunity to ask questions in an open forum.	
	Leaders and managers have the know-how and skills to help colleagues feel connected to the team and to the wider organisation.	
	Colleagues are empowered to make decisions on when they start / end their day / work flexibly as long as the work gets done.	
	Colleagues and teams meet up, where geographically possible, to collaborate together.	
Wellness	Human issues are supported, not hidden. Colleagues feel safe enough to open up to their line leads about their physical, mental and emotional health.	
	There are preventative tools and learning available for leaders and colleagues to encourage everyone to look after their energy and health.	
	There are tools and support available to leaders and colleagues experiencing stress, mental health and other emotional health issues	
	Colleagues use their holiday allowance.	
	The absence policy and sick pay provision allows colleagues to take a reasonable time off to recover from a period of physical or mental ill health.	
Reward	The link between pay and performance is clear to colleagues.	
	Bonus and incentives are structured to drive the behaviours that lead to delivering the goals.	
	Bonus and incentives are structured to deliver individual and/or team performance outcomes as needed to deliver the OKRs.	
	Decisions on individual pay, bonus and incentives are impacted if colleagues are not demonstrating the business values - even if goals are achieved.	
	Share options are used to retain the leaders and colleagues you want to come on the full journey through to an exit.	

Talent	The hiring process helps potential colleagues make good decisions about whether life in a startup is the right choice for them or not.	
	Mindset and values are assessed as part of the hiring decision.	
	Hiring takes account of building diversity of the team, incl. cognitive diversity (i.e. different thinking styles).	
	Colleagues take ownership of their development.	
	Colleagues take ownership of their career.	
	The business uses critical on the job experiences, through internal moves, projects, increased accountability to stretch and develop colleagues - not just promotions.	
	The CxO and leaders formally and informally mentor talent.	
	Line leads have regular conversations about development with their colleagues.	
	There are tools that help colleagues own their development and career at business.	
	Colleagues understand that in a startup / scaleup, career paths can often be horizontal, not just vertical	
	Colleagues believe that you can stretch and develop in this business.	
	Induction and onboarding is effective in getting new hires productive and engaged as fast as possible.	
	Performance and Talent across the organisation is reviewed by the CxO team - with associated actions - at regular points throughout the year.	
Recognition	Individuals and teams are recognised for achieving goals.	
	Individuals and teams are recognised for high levels of effort, even if the goal is missed.	
	Individuals and teams are recognised for living the values.	
	There are regular rhythms of formal recognition.	
	There are regular rhythms of informal, peer led, recognition.	

Trust at the top	The CxO team are on the same page and trust that the others will each get their part of the job done. (Cognitive trust).	
	The CxO team feel safe enough with each other so that difficult conversations and decisions can happen without leading to unhealthy conflict and a breakdown in trust. (Emotional trust).	
Change	Where possible, colleagues have the opportunity to give input into key decisions and changes.	
	Where possible, change is tested before implementation.	
	Effort is put into making sure the change sticks, not just on implementing the actual change.	
	There are tools that leaders have been upskilled in to help navigate individuals and teams through change	