

Visionary's Role at Scale

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The Visionary's role changes as the company grows. What made you indispensable at 10 people can make you a bottleneck at 100. This worksheet helps Visionaries—typically founders—honestly assess where they add the most value now, where they're in the way, and how to evolve their role so the company can scale without losing what made it special.

"The hardest transition for a Visionary isn't letting go of control. It's trusting that the system you built can carry the vision forward without you in every conversation."

— From Swirl to Scale

Visionary Name

Date

1. Where You Add the Most Value

Check the areas where your involvement still moves the needle:

- Setting and communicating the long-term Vision
- Key customer relationships and major deals
- Product vision and innovation direction
- Culture—embodying and reinforcing values
- Recruiting and inspiring top talent
- External presence: brand, speaking, industry
- Board and investor relationships

Other areas where only you can drive the outcome:

2. Where You're in the Way

Be honest. Check the areas where your involvement is slowing things down:

- Approving decisions that others should own
- Attending meetings that would run fine without you
- Jumping into operational details that undermine your team's ownership
- Being the single point of failure for customer or partner relationships

- Changing priorities mid-quarter based on new ideas or excitement
- Holding onto a role (sales, product, etc.) that someone else should own

What are your team members afraid to tell you about your involvement?

3. Transition Plan

For each area where you're in the way, identify who should own it and when you'll hand it off:

Area to Hand Off	New Owner	Transition By	What 'Done' Looks Like

4. Your Evolved Role

In 12 months, what should your typical week look like?

Be specific: what meetings, what activities, what % of your time on what?

What title or role description best captures where you're headed?

Who will hold you accountable for actually making this transition?