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20 Best Practices When Scaling A Service-Based Business

By Expert Panel®, Forbes Councils Member.

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Taking a service-based business to the next level requires entrepreneurs to make decisions with longevity in mind. From designing flexible systems and developing current and new talent to maintaining the quality of your customer experience amid rapid changes, expanding operations in a service-based business is rarely as simple as just adding a few new service offerings.

With scaling often raising challenges in terms of how a business is run, leaning on the advice of those who have been in your place is critical for driving sustainable growth and making fewer mistakes. To help, 20 Forbes Business Council members share best practices

entrepreneurs should follow to successfully scale a service-based business. Read on to learn more about which strategies they found most effective.

1. Create A Strong Foundation

When scaling a service business, I've found that success comes from strong foundations. This includes clear SOPs and processes, infrastructure and policies that reduce leadership friction, and a vision and mission that keep the team aligned. Getting these right up front makes growth smoother, faster and far more sustainable in my experience. - Irina Zakharchenko, ApolloRise Tech

2. Know Your Cash Cycles And Capital Access Limits

Scaling isn't just about demand—it's about liquidity. Many companies fail because growth creates expenses before revenue. The best safeguard is knowing your cash-to-cash cycle and the limits of your capital access. For me, rigorously modeling cash flow timing, stress-testing growth plans and securing capital early have been essential to making growth sustainable. - Kevin Brady, Gnomon, LLC

3. Develop Adaptable Processes And Systems

Focus on creating repeatable processes early. For me, pairing technology with human expertise created scalable value without diluting quality. One best practice is designing systems that can evolve as you grow. This will ensure consistency, free up time for strategy and position your business to scale confidently. - Bill Brewster, Revenue Analytics

4. Document And Refine Your Processes

Scaling is my lived experience. I've led organizations from the startup stage to national scale across the healthcare, business process outsourcing and advisory industries. One best practice I have consistently followed throughout, and actively continue to do today, is documenting and refining processes to ensure growth stays aligned with quality. Also, focusing on relationships, getting teams aligned and providing resources is mission-critical. - Kat Marie Alvarez, KATALYST & Co.

5. Prioritize People Development

Concentrate more on people development than client acquisition. The only way to scale a service business is to enable the team to deliver without the involvement of the founders all the time. Investing in training, strong ownership and leadership at all levels will have a multiplier effect, as your time is no longer growing linearly through your own efforts but being boosted exponentially through your people. - Usman Asif, Devsinc

6. Focus On Consistency

In service industries, success hinges on consistency. Clear procedures and a well-trained staff who exceed expectations ensure daily excellence. This foundation frees leadership to shift from managing details to pursuing innovation and growth. What worked for me was recruiting outside the industry to bring in fresh perspectives on customer service and avoid the limits of traditional thinking. - Zach Wojohn, Valet Vault

7. Become A Trainer

Learning how to train others and develop their talent is a critical step in most entrepreneurial journeys. When it was just my brother and I working together 16 years ago, we recorded everything, summarized our discoveries and began accumulating training material for future hires. Those steps have been critical in growing to an organization of over 260 full-time team members! - Jordan Brannon, Coalition Technologies

8. Prove Need Before Scaling

Before scaling, one best practice is proving that there's a need to scale. Spikes feel like growth, but you'll be left with idle capacity and higher fixed costs if demand is temporary. What works for me is tracking 90-day demand, testing price increases and using waitlists and contractors to flex first. When demand holds, then hire and invest. - John Palinkas, Institute for Digital Transformation

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9. Examine Customer Interactions

Analyzing many interactions—both good and bad—builds experience and prepares you for future situations. Dealing with people is one of the hardest parts of business, and you won't get it right 100% of the time. Everyone is different, and you can never predict how someone will act, but by reflecting on how things went, you can improve your approach and be better equipped to handle different behaviors. - Jordan DeBrincat Mintzas, Altree Developments

10. Identify Other Problems For Current Clients

Scaling a service business means breaking free from time bottlenecks. Strong processes allow you to serve clients efficiently, but true growth comes from identifying more of their problems and offering solutions. Selling extra services to existing clients who already trust your expertise is faster and more sustainable than chasing new ones. - George Adamides, TheAccountantWay

11. Center Value

One fear of scaling is the loss of quality assurance. Design your organizational workflows around the value being delivered to your clients. Ensure that there are appropriate internal controls and dashboards providing assurances and offering visibility into your clients' experiences. Also, design your workflows with intentional simplicity. A simple workflow is easier to replicate, teach and manage on a quality level. - John Gulnac, SolomonEdwards

12. Hire Utility Players

Hire utility players, including leaders who can strategize and analyze, managers who can operate and motivate, and specialists who can produce and innovate. When you identify key employees for expanding roles, have them document their practices and train their replacements. As your business scales, reward people for their performance to incentivize them for future company growth. - Sheryl Tullis, The Line Experience

13. Combine Strong Values With Smart Delegation

What I've learned is that scaling a service-based business requires combining strong values with smart delegation. Embedding core principles into our culture while empowering people to run day-to-day operations allowed us to grow without compromising on quality. This approach has also welcomed growth-inducing innovation from the team while maintaining values that have been forged for over 100 years. - William Louey, Kowloon Motor Bus Company

14. Build Independent Operational Systems

When scaling a service-based business, "design" yourself out of the process early. Build solid systems for current operations so the business can run without your constant input. Otherwise, growth just scales your workload, not your impact. For me, this shift unlocked more time to focus on strategy instead of putting out fires. - Sam Nelson, Downstreet Digital

15. Stay Current With New Tech And Applications

A key best practice is staying current with technology and new applications, especially now that innovative tools are emerging daily. Embracing automation has been a transformative experience for me. By streamlining repetitive tasks and improving efficiency, automation freed up valuable time to focus on growth, strategy and client service, which significantly helped scale my business. - JC Serrano, 1000Attorneys.com

16. Have A Consistent Customer Focus

Consistently focusing on customers through listening, understanding needs and flexibly adapting solutions is the best approach. Clear processes and a strong team are also part of this. We have found that deriving improvements based on active feedback works well to build trust and sustainable success. - Stephy Beck, Flenski.io

17. Leverage Branding And Relationship-Building Resources

Leveraging branding and relationship-building resources can have a tangible impact when scaling service solutions. It allows businesses to focus on new areas while also remaining anchored within the current service base. This is one method we utilize to grow during challenging economic times. Strengthening relationships further fuses lines within ecosystems to lessen the risk of failure. - Paul L. Gunn, Jr., KUOG Corporation

18. Deliver High-Quality Offerings

Focusing on delivering a high-quality offering and working on its scalability. The main problem of service businesses is that as they scale, they cannot keep up with quality. This leads to the loss of clients. Maintaining quality at scale is the key to growing a successful service business. - Ramiro Roballos, Tukki

19. Strengthen Data Privacy Management Systems

I recommend strengthening the management of customers' private data. Along with the expansion of services, a growing scale of data increases the risk for potential data breaches. Customers, too, inevitably feel uneasy about rapidly expanding services. Therefore, it is advisable to not only ensure thorough internal data management, but also disclose these efforts to customers as much as possible. - Karita Takahisa, UNIFY PLATFORM AG

20. Focus On Increasing Resilience

To scale a business, it's essential to consider resilience early on. Invest in process automation and staff development and establish a team within the company that is prepared to act and make informed decisions. Scalability is not just about growth—it's also about increasing resilience so that your business can effectively cope with both booms and downturns. - Yevhen Parokhod, Renty.ae

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