

LeanScaper Certification Assessment

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Rubric Scores

Strategic Alignment:

Your plan ties GreenCore's short-term 30-60-90 milestones to its ambitious 3-year and 10-year growth goals. The sequencing of leadership hiring, internal training, CRM and client communication systems, and targeted networking supports the broader strategy of scaling commercial maintenance while maintaining margin discipline. The integration of lead generation metrics (CPL, lead volume, ROI) with leadership development and operational systems demonstrates a strong line of sight from tactical actions to strategic outcomes.

Application of LeanScaper Core Components:

You applied LeanScaper tools comprehensively: SMART goals, SOP development, CI boards, recurring reviews (weekly, monthly, quarterly), training modules, and performance scorecards. The 6-month plan strengthens this by recommending SOP manuals, role-based scorecards, and training systems tied to measurable KPIs. Each component is placed inside a rhythm that connects to accountability and ongoing improvement.

Advisor Thinking & Framing:

Your posture is clearly that of an advisor. You framed leadership hiring, training, and role clarity as levers for scaling, rather than only listing tactical fixes. The plan consistently elevates the conversation to systems and long-term scalability, while still giving concrete near-term actions (prospect lists, networking, agency selection). At times, the tactical marketing details could be streamlined, but overall the framing remains strategic and systems-oriented.

Scalable Learning & Reinforcement:

Reinforcement is strong: weekly operational check-ins, monthly strategy reviews, quarterly resets, and CI board integration. The 6-month update builds in additional reinforcement through SOPs, scorecards, and structured training linked to performance metrics. These cycles create sustainability, ensuring that leadership development, client communication, and operational improvements are embedded rather than one-time efforts.

Assessment Summary: Pass

Edwin, your plan demonstrates clear alignment with GreenCore's long-term growth strategy, excellent application of LeanScaper components, and a strong advisory posture. You balanced immediate needs (hiring, communication systems, prospect lists) with scalable structures (training systems, SOPs, scorecards, CI boards). The inclusion of both 3-year and 10-year visions shows strong forward-looking thinking. This 30-60-90 framework, supported by a disciplined 6-month action plan, sets a strong foundation for sustainable scaling and leadership development.

Guiding Clients Toward What Good Looks Like

Edwin, your plan illustrates how an advisor helps clients transition from tactical firefighting into scalable leadership and operational systems. By embedding SOPs, scorecards, and training within recurring rhythms, you've demonstrated what good looks like in building a people-first culture that drives profitability and growth.

Your next opportunity as an advisor is to continue sharpening the connection between leadership development and financial outcomes, showing your next client that stronger managers, clearer roles, and disciplined systems aren't just internal improvements, but the key drivers of profitability, retention, and long-term growth.

[What Good Looks Like](#)

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