



Smart Scaling: MAP YOUR PATH

“This program should be a prerequisite for social enterprises considering scaling. It would save everyone a lot of money, time, and aggravation.”

February 2022 Participant

Smart Scaling trains impact enterprise leaders and managers on best practices for driving impact at scale. The program approach, knowledge, and tools are generated from the recognized expertise of the award-winning CASE at Duke team.

Designed to help PORTFOLIO MEMBERS:

TEST PATHWAYS TO IMPACT AT SCALE. Social enterprises have developed solutions to some of our most difficult challenges. But our widespread challenges require solutions implemented at scale. Smart Scaling challenges participants to go beyond growth, to test multiple pathways to impact at scale.

LEAPFROG COMMON – AND AVOIDABLE – TRAPS TO SCALE. Through years of research and active experiences as a funder and an accelerator, we have identified key traps enterprises fall into as they attempt to scale. We articulate the steps enterprises should take to avoid those traps and bias themselves for success.

UTILIZE ACTIONABLE TOOLS TO GUIDE SCALING STRATEGY. Working sessions help participants understand and pressure-test different scale strategies, and leave with a 90-day plan for building and testing a pathway to scale, while garnering buy-in from stakeholders and future funders for that approach.

Additional leverage to help FUNDERS:

AMPLIFY THE IMPACT OF FUNDING. Through this specialized training focused on scale strategy, funders can leverage their investment to manage portfolio companies to achieve greater impact at scale.

ADOPT THE LANGUAGE FOR ASSESSING SCALE. Smart Scaling shifts mindsets about the multiple pathways to scale, and provides clear tactics and tools that can be used to test, measure, and communicate about impact at scale.



“Having been in the impact space for quite some time, I can confidently say that CASE's Smart Scaling training is the most effective impact/strategy/ scale training program in the market.”

May 2022 Participant



SMART SCALING is a proven model for integrating best practice:

A TRAINING THAT EXCEEDS EXPECTATIONS. Previous cohorts have consistently given Smart Scaling an astounding perfect 100 Net Promotor Score. Participants praised the structured instruction and assignments, actionable tools, and facilitated peer learning.

ACCESS TO PROVEN EXPERTS.

The training builds on CASE's 20-year history of studying, supporting, and funding impact enterprises on the road to scale. The program is led by award-winning CASE faculty and staff and supported by leading CEOs and funders who have navigated the path to scale.

"I loved this training. It blew my mind and will strengthen our work for sure."

May 2022 Participant



Erin Worsham, Instructor

Expert and thought leader on social innovation, entrepreneurship, and scaling strategy, with trisector experience.



Cathy Clark, Guest Lecturer

Recognized expert on impact investing and social entrepreneurship with 30 years of experience teaching and training.



Dan Heath, Guest Lecturer

Sought-after speaker, facilitator, and co-author of bestsellers Made to Stick, Switch, Decisive, and The Power of Moments.

SPONSORED PROGRAM OFFERING:

Your portfolio cohort: Smart Scaling to offered to closed groups, through accelerator, funder, or investor partners. Portfolio organizations should have established sufficient traction to be ready to pursue scale, and can be in any geography, any sector, and any size.

Flexible format: The training has been highly successful in a live, online format held over a series of short sessions for a geographically diffuse cohort. The training can also be held in person over 1-2 days. Sessions are highly interactive, including dedicated work time to apply concepts to participants' own impact organization and structured peer feedback.

Wrap-around services: The program can be coupled with wrap-around services such as office hours/coaching or additional training for funders seeking ways to better identify and support scale opportunities.

Interested in partnering with CASE to provide Smart Scaling to your cohort?
Contact case@fuqua.duke.edu to discuss partnership opportunities.

