Team Considerations for Commercialization

This resource provides a sample organizational chart, descriptions of the critical roles for developing a sustainable enterprise, and considerations for when to expand your team.

## Build for Flexibility, Scale with Precision

If your goal is to launch and sustain an enterprise, begin by building a lean, multiskilled team. You likely will not have the resources to hire a large team, so each role should align with your core goals: developing the product, finding customers, and keeping operations running smoothly.

Below is a sample organizational chart and descriptions of the critical roles for developing a sustainable enterprise, followed by considerations for when to expand your team.

LEARN to Scale Toolkit

This resource is part of the LEARN to Scale Toolkit. The toolkit is designed to support researchers and developers in using the Invent-Apply-Transition framework to create, test, and scale evidence-based educational products. Access the full toolkit at learntoscale.org.

Sample Organizational Chart
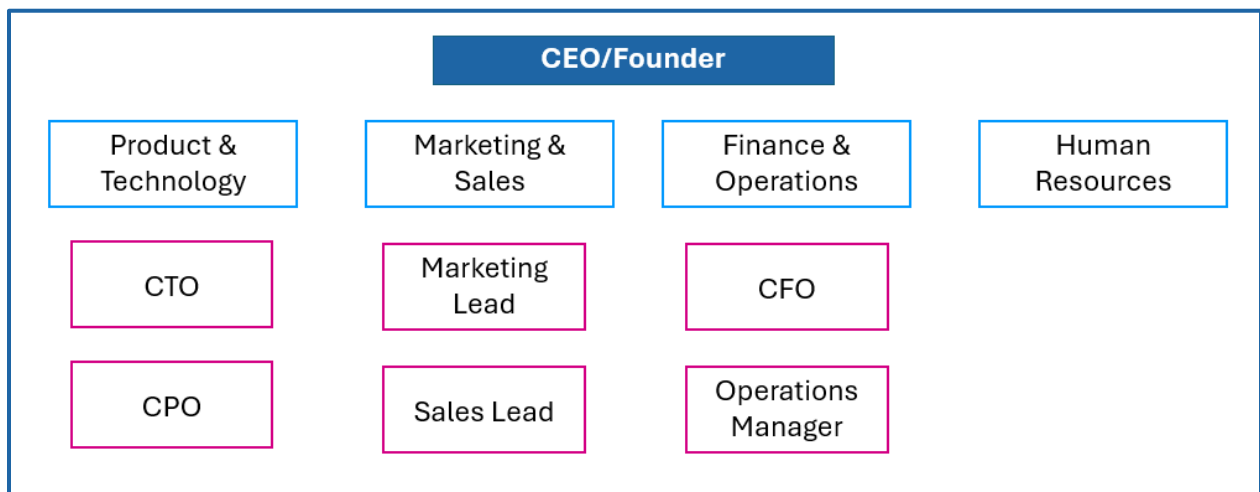
Critical Team Roles

Chief Executive Officer (CEO) / Founder – The Visionary Leader. The CEO drives the company's mission, secures funding, builds partnerships, and oversees all aspects of business operations. Often, this person is also the original innovator who knows the product inside-out and serves as its chief promoter. The CEO is often head of sales in the early years.

- **Why it is essential:** The CEO ensures that the transition from R&D to business is seamless and that the company stays focused on key milestones.

Chief Product Officer (CPO) or Product Lead – The Product Strategist and Champion. The CPO owns the product roadmap and manages the development team to ensure the innovation evolves into a market-ready solution. The person also helps address technical challenges along the way. The CPO is often also the **Chief Technology Officer (CTO)**.

- **Why it is essential:** An enterprise needs someone to focus on continuous improvement of the product, based on the needs of existing customers and the market, and oversee its successful launch.

Marketing Lead – The Growth Engine. The Marketing Lead focuses on generating demand by developing the company's brand, positioning the product in the market, and managing promotional campaigns. This person handles positioning, messaging, multichannel marketing, and lead generation to raise awareness and attract potential customers. The Marketing Lead partners with product and sales to develop a go-to-market strategy.

- **Why it is essential:** Even the best innovation will not succeed without customers. The Marketing Lead ensures that people know about the product and are motivated to buy.

Sales Lead – The Growth Driver and Customer Relationship Builder. The Sales Lead is responsible for finding prospective customers (leads) and converting existing leads into paying customers. This person works closely with the marketing team to follow up on leads and serves as the ambassador for the product and organization across in-person and online channels. The Sales Lead must deeply understand the product as well as the unique needs of potential customers, and be prepared to tailor their pitch to those needs.

- **Why it is essential:** Even with a strong marketing strategy, it takes personal engagement and relationship-building to secure paying customers—especially in industries with long sales cycles or large contracts.

Operations Manager – The Backbone of the Business. The Operations Manager oversees day-to-day business processes, such as systems and tools, vendor relationships, compliance, and fulfillment. This person is responsible for ensuring the business runs smoothly behind the scenes.

- **Why it is essential:** The Operations Manager helps prevent bottlenecks and keeps the team organized, ensuring the business can deliver on time and manages resources effectively.

Chief Financial Officer (CFO) – The Numbers Expert (Optional Early Role). While it is common for the CEO to manage finances in the beginning, bringing in a CFO can be helpful to track cash flow, manage budgets, and plan for future investment needs.

- **Why it is essential:** Sound financial management is critical to avoid running out of funds before achieving profitability.

Human Resources (HR) Lead – The People Leader (Optional Early Role). Early on, the CEO or Operations Manager may handle HR tasks. At a certain point, though, bringing in an HR Lead or

outsourcing with a HR professional becomes essential to keep the team organized, engaged, and compliant with labor regulations.

- **Why it is essential:** As an organization grows, managing people operations—such as hiring, payroll, compliance, and employee satisfaction—becomes more complex and requires an HR specialist skilled in recruitment and talent acquisition, compensation and benefits, and compliance and risk management.

Expanding Your Team

As your business grows, there will be clear signs that it is time to expand your team. Below are some indicators for specialization and the roles to prioritize.

- **Increase in customer demand or sales volume:** If leads and customer orders increase faster than your current team can handle, consider hiring additional sales representatives to maintain momentum and hiring customer success managers to manage post-sale relationships.
- **Growth in operational complexity:** If operational tasks—such as inventory and fulfillment or booking and managing training or professional development—become too much for one person, it is time to expand to include more operations staff to support fulfillment and scheduling.
- **Addition or expansion of a web-based product:** If your product is accessible via a website or mobile app and customer usage increases, you will need additional expertise to ensure stability, performance, and security. This is especially important if your product deals with sensitive data or faces regulatory requirements for data privacy (e.g., General Data Protection Regulation or California Consumer Privacy Act). In this case, you may need a software developer to support backend and frontend development and a data security specialist to ensure security and data privacy management.
- **Expansion of marketing channels:** If your marketing strategy expands into multiple markets or you expand your product offerings, specialized support may be needed. This support may include a marketing lead focused on a specific market and/or product and a digital marketing specialist.
- **Increase in financial complexity:** As revenue grows or you raise new funding, it becomes harder to manage finances without help. Consider hiring a CFO or a financial controller to oversee budgeting and planning.