



Established Business Strategy Checklist

1. Strategic Direction

- Mission and vision still relevant
- Long-term objectives clearly defined
- Core values reflected in decisions
- Strategic priorities for the next 12–36 months

2. Market & Customers

- Core customer segments clearly defined
- Most profitable customers identified
- Evolving customer needs understood
- Retention and loyalty drivers analyzed

3. Value Proposition & Positioning

- Value proposition clearly articulated
- Differentiation remains strong
- Brand positioning aligned with market perception
- Proof of value (results, case studies, data)

4. Products & Services Portfolio

- Product/service mix reviewed
- Profitability by offering analyzed
- Underperforming offerings addressed
- Innovation or refresh roadmap defined



5. Revenue & Financial Health

- Revenue streams diversified
- Cost structure optimized
- Margin performance monitored
- Financial forecasts and targets set

6. Marketing & Sales Effectiveness

- Marketing channels performance reviewed
- Sales funnel conversion rates tracked
- Customer acquisition vs. lifetime value analyzed
- Cross-sell and upsell opportunities identified

7. Operations & Systems

- Core processes documented and optimized
- Technology stack supports scale
- Compliance, risk, and governance reviewed
- Operational bottlenecks addressed

8. People & Leadership

- Organizational structure aligned to strategy
- Key roles and succession plans defined
- Talent development and retention plans in place
- Leadership decision-making clarity



9. Metrics & Performance Management

- Strategic KPIs defined and tracked
- Financial and operational dashboards in use
- Performance review cadence established
- Accountability clearly assigned

10. Growth, Risk & Resilience

- Growth opportunities prioritized
- Competitive and market risks assessed
- Scenario and contingency planning completed
- Strategy review and adjustment cycle set

Established Business Focus

Optimize what works. Fix what doesn't. Invest where it matters most.