



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
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2. Market & Customers

- Core customer segments clearly defined
 - Most profitable customers identified
 - Evolving customer needs understood
 - Retention and loyalty drivers analyzed
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3. Value Proposition & Positioning

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

- Core processes documented and optimized
 - Technology stack supports scale
 - Compliance, risk, and governance reviewed
 - Operational bottlenecks addressed
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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
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10. Growth, Risk & Resilience

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

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