

Strategy Readiness Checklist

*A practical self-assessment for founders,
leadership teams, and growth leads*

How to use this checklist

Answer **Yes**, **Partially**, or **No** to each statement.

Too many "No's" means the strategy will struggle no matter how smart it is.



1. Direction & Clarity

- We can clearly articulate what problem we solve without buzzwords
- Our primary customer segment is clearly defined and agreed internally
- We know what success looks like in the next 6-12 months
- Our short-term goals align with long-term ambition
- Leadership is aligned on priorities

Reality check: *If different leaders give different answers here, there's a problem.*

2. Market Understanding

- We understand our customers' real buying triggers, not just demographics
- We know why customers choose us over alternatives
- We understand why some prospects do not convert
- We actively track customer feedback beyond vanity metrics
- We can name our real competitors, not just aspirational ones

Reality check: *If strategy is based on assumptions, it's a hypothesis, not a plan.*

3. Business Model Readiness

- Our pricing reflects value, not panic or imitation
- We understand our margins and unit economics
- We know which products or services drive real profit
- We can confidently explain how money moves through the business
- Discounts and promotions are intentional, not habitual

Reality check: *If the model doesn't work, no amount of marketing will fix it.*

4. Data & Insight



- We track performance metrics that actually influence decisions
- Data is reviewed consistently, not only when things go wrong
- We can link actions to outcomes with reasonable clarity
- Decisions are informed by insight, not ego or hierarchy
- We know what data we're missing and why it matters

Reality check: *Data is only useful if someone is willing to act on it.*

5. Team & Execution Capacity

- Roles and responsibilities are clearly defined
- The team understands what matters most right now
- We have the capacity to execute, not just plan
- Feedback flows both ways without fear
- Accountability exists beyond titles

Reality check: *A stretched or confused team will break even the best strategy.*

6. Processes & Systems

- Core processes are documented and followed
- We are not constantly operating in fire-fighting mode
- Key decisions don't depend on one person alone
- Tools and systems support work instead of slowing it down
- We can scale without chaos increasing proportionally

Reality check: *If everything is urgent, nothing is strategic.*

7. Leadership & Decision-Making

- Leaders make decisions and stand by them
- There is room for challenge and disagreement
- Strategy discussions are not dominated by emotions



- Leadership behaviour matches stated values
- People feel safe telling the truth upward

Reality check: *Strategy fails fastest in environments where honesty is punished.*

8. Financial & Resource Discipline

- We know what we can realistically afford
- Spending aligns with priorities, not noise
- We understand the cost of delay and indecision
- Resources are allocated intentionally
- Growth expectations match investment reality

Reality check: *Ambition without resource discipline creates exhaustion, not growth.*

9. Readiness for External Support

- We are open to uncomfortable insights
- We want clarity, not validation
- Leadership is willing to change direction if required
- We are prepared to implement recommendations
- We see strategy as a discipline, not a document

Reality check: *If you want applause, don't hire strategists.*



How to Interpret Your Results

Mostly Yes	You're ready for serious strategy work. Your foundations are solid enough to build on.
Many Partials	You need alignment and clarification before deep strategy. Focus on consensus-building first.
Many Nos	Fix fundamentals first, or the strategy will be wasted effort. Prioritize operational stability.

Final Thought

Strategy doesn't fix dysfunction. It exposes it.

If you're brave enough to look honestly, you're already ahead.