

Right Strategy - Well Executed - Checklist

Is Your Strategy Being Well Executed? A Checklist to Stay on Course

Effective strategy execution translates strategic intent into real results. Use this strategy execution checklist to quickly assess how well the team is executing the firm's strategic direction, focus, path to win, alignment, and actions. Check in the box for each best practice that is consistently and effectively practiced at the firm.

01 Right Direction

- ☐ The things we're working on reflect our shared definition of success.
- ☐ We track leading indicators that show whether our strategy is gaining traction.
- ☐ We track progress against strategy plan outcomes in terms of results, not tasks.
- ☐ We scorecard initiatives to help us manage tightly to plan.

02 Right Focus

- ☐ We work our highest-priority strategic initiatives and allocate resources accordingly.
- ☐ We evaluate new opportunities against our strategic priorities, and pause or stop initiatives that do not fit our strategy.
- ☐ We actively adjust strategic initiatives that drift.

03 Right Path to Win

- ☐ We understand where, when, and why we are winning or losing.
- ☐ We use evidence from key markets and customers to refine strategy execution.
- ☐ We regularly test the assumptions underlying our strategy.

04 Right Alignment

- ☐ Leadership is united behind a shared strategic vision and plan.
- ☐ Leadership clearly communicates the rationale behind major decisions and changes.
- ☐ Employees understand how their work contributes to strategic goals.
- ☐ Leaders support one another and hold one another accountable for results.

05 Right Actions

- ☐ Initiative owners report regularly and are accountable for outcomes.
- ☐ Managers are empowered to translate strategy into execution.
- ☐ Functions collaborate around shared goals and metrics.
- ☐ We are agile in adjusting our plans, resources, and assumptions as conditions change.

Notice the gaps that arise from best practices not checked. Then build a plan. Which 3-5 gaps are the highest priorities to address? Which gaps need priority attention in the next 90 days? What actions will close the gaps? If you want any help at all, please call or email our team for a free consult.