Shepherd Advisors

Right Strategy Checklist

Do you have the right growth strategy?

We have been helping leaders develop right growth strategies for their companies for more than two decades. Across industries and growth stages, we've found that five ingredients are critical to creating the right strategy recipe for leaders and their teams: **Right Direction, Right Focus, Path to Win, Alignment, and Execution.**

To gauge whether your strategy is right for your organization, go through the list below and check the boxes that reflect your experience of the business. As you do, notice where you can respond confidently and where you hesitate, debate, or feel uncertain.

Right Direction

- ☐ We have a clear, shared definition of what success looks like (3–5 years out).
- ☐ We can clearly explain how our strategy will create and capture value over time.
- ☐ We have clear growth ambitions, targets, and success metrics.

Path to Win

- ☐ We are confident that we are targeting the right markets and customers.
- ☐ We can clearly explain how we win and why customers choose us.
- ☐ Our value proposition sets us apart, conveys unique value, and is understood by our customers and our own team.
- ☐ Our strategy leverages and strengthens our core business and expands in new areas, building on key strengths and capabilities.

Right Focus

- ☐ We are disciplined about trade-offs. What we will NOT pursue is as clear as what we will.
- ☐ We focus on a small number of top priorities–and actively say no to others.
- ☐ We have prioritized where to compete and opportunities to pursue.

Alignment

- ☐ Our leadership team is fully aligned on the strategy, priorities, and direction–and fully committed to executing it.
- ☐ Our markets, offerings, positioning, and execution all reinforce each other.
- ☐ Our people understand the strategy and how their work connects to it.

Execution

- ☐ We have clear priorities, owners, and action plans that make execution straightforward.
- ☐ The organization understands the strategy, has the support needed to execute it, and invests its resources (capital, talent, time) in line with our strategic priorities.
- ☐ We see traction as we build sustainable profitability and value creation, in part because we adjust quickly when assumptions prove wrong.

www.shepherdadvisors.com
e: loch@shepherdadvisors.com
p: +1 734 975 0333
Ann Arbor, Michigan