

STRATEGIC GROWTH READINESS CHECKLIST

A Self-Assessment for Marketing, Operations, and Revenue Growth

This checklist is designed to help you assess your organization's readiness for strategic growth. Review each area to identify strengths, gaps, and opportunities that will inform your next phase of development. The more items you check, the more equipped your organization is to scale with clarity and confidence.

1. Strategic Foundation

- ☐ Our value proposition is clearly defined and easy to articulate.
- ☐ We understand our competitive landscape and market positioning.
- ☐ We have a documented marketing strategy aligned with business goals.
- ☐ Leadership is aligned on growth priorities and success metrics.
- ☐ We review our strategic plan at least quarterly.

2. Brand and Messaging Alignment

- ☐ Our brand accurately reflects who we are and what we offer.
- ☐ Messaging is consistent across our website, social channels, and sales assets.
- ☐ We have defined audience personas and use them in marketing decisions.
- ☐ Our website clearly communicates our value and differentiators.
- ☐ We have current, cohesive brand guidelines.

3. Marketing Operations and Infrastructure

- ☐ Our CRM is configured properly with complete data and automation workflows.
- ☐ Lead scoring, segmentation, and lifecycle stages are clearly defined.
- ☐ Our MarTech stack supports our goals without unnecessary complexity.
- ☐ Attribution tracking is in place across channels.
- ☐ Team members understand and use our marketing tools effectively.

4. Digital Performance and Analytics

- ☐ We actively monitor KPIs across SEO, paid media, email, and social.
- ☐ Dashboards and reports are accurate, timely, and actionable.
- ☐ We understand our CAC, LTV, and key conversion metrics.
- ☐ Our campaigns are optimized based on data, not intuition.
- ☐ We have a structured testing and experimentation plan.

5. Demand Generation and Customer Acquisition

- ☐ We have consistent inbound lead flow from multiple channels.
- ☐ Our paid media strategy is structured, optimized, and measured.
- ☐ Organic search drives meaningful traffic and conversions.
- ☐ We have automated lead nurturing or email sequences in place.
- ☐ Our sales or onboarding process is aligned with marketing.

6. Revenue and Forecasting Readiness

- ☐ We have a forecast model tied to marketing inputs and performance.
- ☐ Revenue goals are based on data rather than assumptions.
- ☐ We know which products or services drive the highest margin.
- ☐ Financial planning aligns with marketing and operational capacity.
- ☐ We monitor profitability and efficiency across channels.

7. Team, Process, and Accountability

- ☐ Roles and responsibilities are clearly defined across all marketing and operational teams.
- ☐ We have documented processes for recurring marketing activities.
- ☐ Cross-functional communication is structured and consistent.
- ☐ We track performance against goals and adjust as needed.
- ☐ We have leadership oversight to ensure accountability.

Growth Readiness Score

- **0–10 checks:** Foundational improvements needed before scaling
- **11–20 checks:** Operational improvements will unlock growth
- **21–30 checks:** You are positioned for strategic acceleration
- **31+ checks:** Strong readiness for aggressive growth initiatives

Want help evaluating your results and identifying your highest-impact opportunities? Book a strategy session and get expert guidance tailored to your organization. Contact me at sara@strategicgrowthstudio.com or at 757-977-3871.