**5 switch**

# Business Growth Readiness Checklist

Find out if your business is ready
to grow and scale.

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# [ TIER 1 ] Foundational Priorities (Highest Impact)

[ Yes | Somewhat | No ]

### [ 1 ] Clarity on Financials

Are accurate financial statements (income statement, balance sheet, cash flow) available for review within 10 business days of month-end? ☐ ☐ ☐

Is revenue tracked and segmented by product/service, customer type, or channel? ☐ ☐ ☐

Are operating costs and COGS regularly reviewed and aligned with benchmarks? ☐ ☐ ☐

### [ 2 ] People and Values Alignment

Are all team members aligned with core values? ☐ ☐ ☐

Is there an accountability chart (not just an org chart) that ensures clarity in roles and responsibilities? ☐ ☐ ☐

Does everyone in the organization "GWC" their role (Get it, Want it, Capacity to do it)? ☐ ☐ ☐

### [ 3 ] Strategic Vision

Is there a documented 3-year vision and 1-year set of goals shared with the team? ☐ ☐ ☐

Are company-wide OKRs (Objectives and Key Results) established and reviewed quarterly? ☐ ☐ ☐

### [ 4 ] Sales and Marketing Alignment

Is the Ideal Customer Profile (ICP) clearly defined and consistently targeted by sales and marketing efforts? ☐ ☐ ☐

Are sales KPIs (e.g., close rates, pipeline velocity) and marketing metrics (e.g., ROI, lead conversion) tracked regularly? ☐ ☐ ☐

Is there a repeatable, data-driven process for acquiring and retaining customers? ☐ ☐ ☐

### [ 5 ] Meeting Pulse

Are weekly leadership meetings held with a structured agenda focusing on priorities, metrics, and problem-solving? ☐ ☐ ☐

# [ TIER 2 ] Strategic Execution and Accountability

[ Yes | Somewhat | No ]

## [ 1 ] Execution Framework

Are OKRs cascaded across teams with clear ownership and timelines? ☐ ☐ ☐

Are progress and accountability reviewed in weekly or bi-weekly meetings? ☐ ☐ ☐

Are scorecards in place and reviewed at least monthly to measure key operational and financial metrics? ☐ ☐ ☐

## [ 2 ] Customer Experience

Is customer feedback routinely collected and used to improve offerings and service? ☐ ☐ ☐

Are customer retention rates and lifetime value tracked and optimized? ☐ ☐ ☐

Is there a strategy in place to upsell or cross-sell to existing customers? ☐ ☐ ☐

## [ 3 ] Risk and Compliance

Is there a cybersecurity and data privacy policy that aligns with GDPR and other relevant regulations? ☐ ☐ ☐

Are all licenses, certifications, and regulatory requirements current and routinely audited? ☐ ☐ ☐

Are contingency plans in place for top operational and market risks? ☐ ☐ ☐

## [ 4 ] Contracts and Agreements

Are client, vendor, and employee contracts up to date and legally sound? ☐ ☐ ☐

Are NDAs and intellectual property protections in place for sensitive business information? ☐ ☐ ☐

## [ 5 ] Process and Technology Optimization

Are key business processes documented, standardized, and optimized for efficiency? ☐ ☐ ☐

Are technology tools effectively integrated to eliminate manual redundancies? ☐ ☐ ☐

Is the current tech stack evaluated periodically to ensure alignment with operational goals? ☐ ☐ ☐

## [ TIER 3 ]  Optimization and Scalability

[ Yes | Somewhat | No ]

### [ 1 ] Scalability of Operations

Are current processes scalable to handle growth without a loss in quality or efficiency?  ☐ ☐ ☐

Are roles and responsibilities adaptable to a larger team structure as the company grows?  ☐ ☐ ☐

### [ 2 ] Employee Development

Is an employee onboarding and retention strategy clearly established?  ☐ ☐ ☐

Are regular performance reviews and coaching sessions conducted?  ☐ ☐ ☐

Are employees provided access to development opportunities (training, mentorship, certifications)?

Are succession plans in place for critical roles?  ☐ ☐ ☐

### [ 3 ] Innovation and Market Responsiveness

Is there a system in place for monitoring industry trends, competitor movements, and customer demands?  ☐ ☐ ☐

### [ 4 ] Crisis Preparedness

Is there a business continuity plan for operational disruptions?  ☐ ☐ ☐

Are potential crisis scenarios tested to ensure preparedness?  ☐ ☐ ☐