

4-POINT CHECKLIST FOR SURE-FIRE TECH SERVICES PLANS

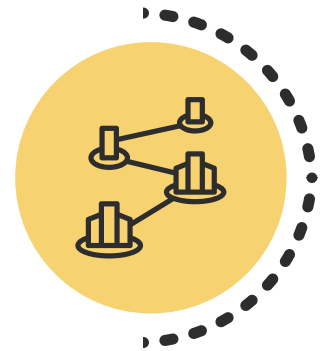
Is your company working like a well-oiled machine? Do you have systems in place to execute your goals? This simple checklist will give you a quick understanding of your capabilities and tell you where to focus.

1

REVENUE GROWTH MODEL

- Current quarter revenue and bookings forecast
- Next quarter revenue and bookings forecast
- Annual revenue and bookings targets
- Lead target and cost per lead for each lead source to track bookings beyond six months

Learn More About This: [Guarding Against Down Quarters](#)



2

FINANCIAL STRATEGY

- Delivery cost to hit revenue goals
- Breakdown of costs between sales & marketing, delivery, and operations
- Cashflow analysis and financing options in place

Learn More About This: [SCORE Financial Planning Templates](#)

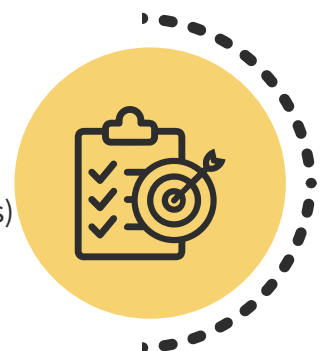


3

ORGANIZATION PLANNING

- SWOT analysis to identify strategic goals
- Quarterly Objectives to clarify strategy
- Measurable Key Results to quantify Objectives (OKRs)
- Initiatives in service of OKRs

Learn More About This: [How to Implement OKRs in 5 Easy Steps](#)



4

EXECUTION

- Regular executive team sync on progress, realignment, and updates to plans
- System of records to monitor initiatives and coordinate around dependencies
- Townhalls for company-wide communication and alignment of priorities

Learn More About This: [Planning vs Wishful Thinking](#)

