



Business-Pivot Checklist

How to address dramatic marketplace changes

These are fast-paced, daily-changing times when the business owners worldwide are experiencing never-seen-before conditions and facing mandates that require them to structure their businesses and teams differently, engage their customers more creatively and reallocate resources in an unprecedented time. There is far less time for Trial & Error due to how fast the marketplace is changing so the time to PIVOT is now. Adapt to change by utilizing this business tool to help you survive and thrive.

Here are the main categories to review immediately. Set Priorities based on your specific business needs. Check all the areas your business must make adjustments, shifts and pivots now. Your Team at ActionCOACH® will guide you to quickly navigate these changes.

1. Mindset & Perspective – Elevate it and Focus Forward

All your stakeholders will need support. Consider what your organization is doing to address the most basic needs of them. Where are they on the Maslow's Hierarchy of Needs? Help each group move up the pyramid.



2. Business Structure

What are the different tasks/activities/processes that have to be done with the adjustments & pivots identified?

What could you do that you have never attempted in the past?

What adjustments to team member compensation plans are necessary, based upon revised roles, activities and outcomes?

What is the new cost structure?

How do you turn costs into profits?

Reallocate Resources (See separate checklist "15 Resource Reallocation Areas")

3. Employee, Customers, Supplier, Client Engagement & Communications

How often will you communicate with each population?

What form will the communication take?

How and how often will you gather and give feedback?

What emails messaging and content will you need to develop to reach prospects and existing database lists?

4. Marketing & Sales

What is “new” or adjustments to your USP (unique selling proposition)/WIIFM (what’s in it for me) communication need to be in this new Marketplace?

What marketing budget adjustments are necessary to keep lead flow and sales coming in?

What new marketing tactics will you need to better reach clients, customers and prospects?

5. Products/Services delivery

How will you communicate any new product/services or changes to delivery?

Who needs to be informed about the changes and new demands on your organization?

Consider renegotiating terms and contracts to meet new current situation.

6. Supply Pipeline

What adjustments should be made to shore up resources and supply chain disruptions?

How do you communicate changes and delays?

What new suppliers or materials will you need?

7. Workforce Reallocations, Working environments & Workplace safety measures

How can you reallocate current talent (team members) into the new tasks, activities and responsibilities? *This may be a matter of team members having a new mix of tasks, activities and responsibilities keeping some of the prior and adding new.*

Outline new activities and job responsibilities as needed.

Recalibrate and update your team’s scorecards.

8. New Opportunities or product offerings to meet the demands of the new marketplace

What are the new target audiences you may need to tap into to get your new offerings into the marketplace?

What new marketing tactics or messaging will you need?

9. Resources, Education, Training Needs

What skills, processes and systems training must be developed and implemented to meet the new normal conditions.

What will employees need to learn to meet the needs of the new marketplace demands (Systems, processes, policies etc.)?

10. Metrics and Measures of Success

What adjustments must be made to the KPI’s of the business, departments and team members? What are the new minimum standards for each KPI?

How will you measure activities (daily, weekly, monthly etc.)?

What are the expected outcomes of new activities, what are the expected results?