Quarterly Relevance Checklist

A 60-minute check-in to catch small gaps before they become big ones. Walk through each section, be honest about what's changed and flag anything worth a closer look.

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1. Where You Stand

- Has our pricing changed — or should it — since the last review?
- Are we attracting the same type of customer we were three months ago?
- Does our messaging still reflect who we are today, or an earlier version of the business?
- Is there a gap between how we describe ourselves and how customers actually experience us?
- Have any new products, services or offers gone live that our materials don't reflect yet?

2. What's Happening Around Us

- Have competitors launched anything new in the last 90 days?
- Has anyone in our category changed their messaging or positioning?
- Are competitors showing up in new places — new channels, new partnerships, new audiences?
- Does our position still feel distinct, or has the space gotten more crowded?
- Is there a competitor move worth responding to, or just worth watching?

3. What Customers Expect Now

- Have we noticed new or different questions coming from customers?
- What are customers comparing us to that they weren't before?
- Where has friction shown up recently — in response time, process or communication?
- Are customers expecting something (speed, transparency, digital convenience) we haven't caught up to yet?
- Has anything that used to feel exceptional started to feel standard?

4. The Gut Check

- Does our current message still feel accurate?

- Is there anything we're saying out of habit rather than because it's still true?
- If we were introducing this business for the first time today, would we describe it the same way?
- What's one small adjustment worth making this quarter?
- Who needs to be looped in to make adjustments happen?

How to use this: The goal is just to notice drift early — a sharper message, a different channel, a small pricing tweak — before it becomes a bigger fix down the road.