

Situation assessment

How to use it: Before you plan where you're going, be honest about where you are. Fill in each section with facts first, opinions second. Write "don't know" when you don't know. That's a finding too. Then use section 10 to pick the few issues that really matter.

Worked examples use **"Northbound Oat Co." — a fictional oat-milk brand**. Not a real company.

1. Market

- How big is your market, and is it growing, flat or shrinking? Where's your source?
- What big trends help or hurt you?

Fictional example: Plant-based milk is crowded; shoppers are getting pickier about taste and price.

2. Category

- How does your category work at shelf? Who sets the rules: retailers, leaders, price?
- Where are the gaps?

Fictional example: Shelf is led by a few big brands; "barista" versions get the most space.

3. Consumer and shopper

- Who buys, who uses, and why?
- What do they love, and what makes them switch?

Fictional example: Buyers are mostly parents; kids drink it; switching happens on promo.

4. Competitors

- Who are your top three competitors, direct and indirect?
- What do they do better than you? Be honest.

Fictional example: Main rival wins on distribution and promo depth; we win on taste (per our own tastings).

5. Channels and distribution

- Where are you sold today: retail, direct to consumer, foodservice, export?
- Which channel makes money, and which one just makes noise?

Fictional example: Two grocery banners, a small direct-to-consumer store, one café chain. Retail pays the bills.

6. Brand health

- What do people know and say about you?
- What do you have proof of (reviews, repeat purchase, sales data) versus what you hope?

Fictional example: Strong reviews online; low awareness outside our home region.

7. Product, price, place, promotion

P	Where you stand today	What's working	What's not
Product			
Price			
Place			
Promotion			

Fictional example (Price): Priced above the leader; holds fine in-store until a rival runs a deep promo.

8. Strengths, weaknesses, opportunities, threats

Strengths	Weaknesses
Opportunities	Threats

Fictional example: Strength — taste. Weakness — thin distribution. Opportunity — foodservice. Threat — private label.

9. Resources

- Team, budget, time, partners. What do you really have to work with?

Fictional example: Founder plus one marketing coordinator; small budget; strong co-packer.

10. Key issues

- From everything above, what are the 3 to 5 issues that, if fixed, change the business?
- Write each as a question to answer.

Fictional example: How do we win trial when we can't outspend the leader on promo?