



LEADERSHIP DISCUSSION DOCUMENT – ARE YOU PLAYING OFFENSE OR DEFENSE?



INTRODUCTION

Great leaders don't just react to circumstances—they set the pace. While defense may protect what you have, offense is what creates opportunity, growth, and long-term advantage. This discussion document is designed to challenge you and your team to shift your perspective: instead of asking “How do we hold on?” start asking “How do we win?”

The questions inside are meant to spark candid reflection on the current realities of your business—competition, margins, cash flow, pipelines, and leadership gaps—but with the clear goal of charting a more aggressive, forward-leaning strategy. The focus is on uncovering what's holding you back, identifying the obstacles in your path, and committing to the actions that will move your organization from playing not to lose, to playing to win.

This isn't about reckless risk-taking. It's about being intentional, bold, and future-focused. Use this tool to push your team into an offensive posture—one that embraces innovation, pursues opportunities, and drives your business forward with clarity and confidence.

Are You Playing Offense or Defense?

The current state of your business:

▶ Is the market growing or contracting?

▶ Do you have more or less competition?

▶ Are your margins growing or contracting or performing as expected?

▶ Is your cash flow growing or contracting or staying constant?

▶ Do you have too many or too few employees or the right number?

▶ How well is your supply chain functioning? Are material delays significantly affecting your operational efficiency?

▶ Is your sales pipeline growing or contracting?

▶ Is the sales cycle expanding or contracting or staying consistent?

▶ Is the average sale size/amount growing or contracting or staying the same?

► Is your work backlog/WIP growing or contracting?

► How well diversified are you from a market, client, or product/service basis? Can you withstand a major loss in any one of these categories?

► Is M&A activity increasing or decreasing in your market? What does this mean for you?

► How are you integrating interest rate dynamics into your economic model?

► How do you think Artificial Intelligence will affect your business model in the next 1-3 years?



Do you have the leadership team in place to navigate the current climate? If not, where are your gaps and what can you do about it?

What is your take on the next two years related to all of the above?

Given the above, do you see yourself playing more offense or defense as a leader?

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Please list in what ways you are currently playing either offense or defense as a business leader:

| Offense | Defense |
|---------|---------|
| | |

What is the biggest question you have about your business right now?

What's the biggest obstacle to your success short-term and long term? How can you go about addressing the issue(s)?

How should your business play the game over the next 1-2 years? What's missing from your current approach?

Are there any gaps in your existing leadership team that must be addressed? What are you doing about this?

How do you need to change/reinvent yourself as a leader to successfully meet the needs of the business in the current and future economic environment?

Are you having fun as a leader right now? If not, why and what can you do about this?
