



2027 3PL Strategic Planning Checklist

Use this checklist before your leadership team finalizes next year's plan. Check each item when you're confident the answer is clear and actionable.

- ☐ Have we clearly identified the two or three growth priorities that matter most in 2027?
- ☐ Have we defined which customer types are the best fit for our capabilities, margin goals, and long-term direction?
- ☐ Have we evaluated which markets give us a realistic chance to win based on demand, fit, and differentiation?
- ☐ Have we worked backward from our revenue goal to estimate the number of new customers, qualified opportunities, and leads required?
- ☐ Have we identified the biggest bottlenecks in our current pipeline, whether in visibility, lead generation, follow-up, or conversion?
- ☐ Have we decided what marketing needs to accomplish to support our growth strategy, not just what budget to assign to it?
- ☐ Have we reviewed whether our website, messaging, content, and SEO visibility are strong enough to support the markets and buyers we want to pursue?
- ☐ Have we created a clear stop-doing list so time, money, and attention can be reallocated to higher-priority growth opportunities?

