



Worksheet: Entering New Markets – a Strategic Playbook for Leaders

You and your leadership team have done your homework and decided to take the leap into a new market. Now comes the real test of you and your organization: executing the strategy successfully.

This action-oriented worksheet can be a useful tool for supporting your efforts to maximize the opportunities for growth that come with entering new markets. It will help you and your senior colleagues to establish critical actions and responsibilities; reflect on the risks; and track key decisions, metrics, and early success indicators.

Section 1: Pre-Entry Planning and Risk Assessment

Question	Answer	Owner	Due date
What early indicators will signal a strong product-market fit within the first 90 days?			
What assumptions (e.g., about customer behavior, demand, or operations) are we basing this on?			
What's our risk mitigation plan if those assumptions prove false?			
Who has the authority to pause, pivot or escalate if challenges emerge post-launch?			



Section 2: Partnership Alignment and Local Intelligence

Who are our key local partners (e.g., distributors, advisors, regulators)?

YES

NO

Have we defined shared success metrics with them?

What legal, financial or cultural gaps can these partners help close?

YES

NO

Are roles and responsibilities contractually clear and operationally practical?

Do we have a local relationship owner within our leadership team?



Section 3: Culture and Communications Readiness

You can use the following four questions as prompts for senior team discussion:

1. What are the most important cultural differences between our HQ market and this new one?
2. How will we show respect for local norms while maintaining brand consistency?
3. How will we handle communication breakdowns or missteps?
4. What cultural assumptions might we need to challenge internally?

Have you initiated the following actions as part of your preparation for entering your new market?

YES

NO

- Cultural awareness training for leadership and frontline teams.
- Review of local brand adaptation (language, symbols, pricing norms).
- Communications plan aligned across HQ and local markets.

If you answered **No** to any of the above, was that because you had properly explored the pros and cons of doing so?

Section 4: Operational Setup and Launch Readiness

This table will help you to assess your launch readiness. (You may already have done this work as part of your market entry preparation. If not, it can be a timely reminder!)

Task	Status (Complete; In progress; Not started)	Notes
Local supply chain mapped and stress-tested		
Customer support and post-sale systems localized		
Legal and regulatory compliance confirmed		
Finance and reporting systems adapted for local requirements		
Launch date confirmed, with cross-functional coordination		



Section 5: Early KPIs and Learning Triggers

Set clear metrics — but be ready to adapt. Track these within your first 90–120 days.

KPI / Learning Goal	Target / Threshold	Insights Gained / Action Taken
Initial customer acquisition (e.g., volume, cost, source)		
Partner engagement / delivery performance		
Customer feedback themes (e.g., unmet needs, friction)		
Brand perception / relevance in local market		
Operational resilience (issues escalated vs. resolved)		

Section 6: Pivot Points and Escalation Criteria

You can use the following scenarios as prompts for senior team discussion:

- If customer adoption is 50 percent lower than expected by Month 3, what action will we take?
- If local partner performance is misaligned or delayed, what's our contingency?
- If brand backlash or misalignment occurs, who leads the response?