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Org Design Starter Checklist

Start with structure, not names.

1. Clarify the Strategy

What's the actual business strategy over the next 1–3 years?

What outcomes are non-negotiable? (Revenue, margin, product, growth, etc.)

What's going to get in the way? (Market dynamics, internal roadblocks, talent gaps)

If you don't know where you're going, any org chart will do.

2. Define the Work That Needs to Be Done

What are the critical functions to deliver the strategy?

Where do you need to add capability (not just headcount)?

What work is being duplicated, dropped, or done out of habit?

3. Sketch a Clean Structure

Start with a blank page. Map roles based on what needs to happen—not who's in the seats today.

Ask:

- What functions should report directly to me?
- What roles could be combined or split?
- Where do I need more depth vs. more leadership?

Structure should follow strategy. Not personalities.



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4. Stress Test It

Where are the decision-making bottlenecks?

Are any roles too wide or too narrow in scope?

Is accountability clear—or are 3 people responsible for the same thing?

If it looks tidy but breaks under pressure, it's wrong.

5. Layer in People (Last, Not First)

Who fits naturally into the new structure?

Who could fit but might need development?

Who is a great person in the wrong role?

6. Plan the Transition

What's the timeline to move to the new structure?

How will you communicate it to your leadership team?

Where will you likely face resistance or politics?

The real work starts after the chart is done.