



NORTHERNEDGE

Leadership Gap Checklist

A practical self-assessment for small and mid-sized organizations that need executive-level guidance without adding a full-time C-Suite salary.

Purpose

Use this checklist to identify where leadership capacity, accountability, or specialized executive expertise may be limiting growth and execution.

Company _____	Completed by _____
Date _____	Next review _____

How to use it

Mark Yes when the statement is consistently true, Partly when it is inconsistent or incomplete, and No when it is absent or unknown. Assign 2 points for Yes, 1 for Partly, and 0 for No. Capture an owner or note for every Partly or No response.

YES	PARTLY	NO
2 points	1 point	0 points

1.Strategic Direction & Executive Ownership

Leadership Statement	Yes	Partly	No	Owner / notes
Our 12-24 month growth priorities are documented and ranked.	☐	☐	☐	_____
Each major initiative has one accountable executive owner.	☐	☐	☐	_____
Leadership can explain how priorities connect to revenue, margin, customer value, or risk reduction.	☐	☐	☐	_____
Trade-offs and stop/start decisions are made promptly when capacity is constrained.	☐	☐	☐	_____
The leadership team reviews progress against strategic outcomes, not only activity.	☐	☐	☐	_____

2.Technology Leadership & Digital Readiness

Leadership statement	Yes	Partly	No	Owner / notes
Technology priorities are tied directly to business goals.	☐	☐	☐	_____
A qualified leader owns architecture, vendors, cybersecurity, data, and modernization decisions.	☐	☐	☐	_____
Critical systems have a documented modernization roadmap.	☐	☐	☐	_____
AI and automation opportunities are evaluated with business value, data readiness, and risk in mind.	☐	☐	☐	_____
Technology investments have clear business cases, owners, milestones, and adoption plans.	☐	☐	☐	_____

3. Operational Leadership & Execution

Leadership statement	Yes	Partly	No	Owner / notes
Core processes are documented, measurable, and consistently followed.	☐	☐	☐	_____
Cross-functional initiatives have clear decision rights and escalation paths.	☐	☐	☐	_____
Operational bottlenecks are visible and addressed before they affect customers.	☐	☐	☐	_____
Leaders have reliable capacity, quality, cycle-time, and service-level indicators.	☐	☐	☐	_____
The organization can scale volume without depending on heroic effort from a few people.	☐	☐	☐	_____

4. Financial Governance & Decision Support

Leadership statement	Yes	Partly	No	Owner / notes
Leadership has timely visibility into cash, margin, forecast, and budget performance.	☐	☐	☐	_____
Strategic initiatives include expected cost, benefit, risk, and funding source.	☐	☐	☐	_____
Pricing and profitability are reviewed by customer, offering, or channel where practical.	☐	☐	☐	_____
Financial scenarios are used before major hiring, technology, or expansion decisions.	☐	☐	☐	_____
A qualified leader can challenge assumptions and translate financial data into decisions.	☐	☐	☐	_____

5. Cybersecurity, Risk & Business Resilience

Leadership statement	Yes	Partly	No	Owner / notes
A leader is accountable for cybersecurity and enterprise risk oversight.	☐	☐	☐	_____
Critical assets, vendors, access, backups, and incident responsibilities are documented.	☐	☐	☐	_____
Leadership receives understandable risk reporting and makes documented risk decisions.	☐	☐	☐	_____
Business continuity and recovery plans are tested and updated.	☐	☐	☐	_____
Compliance, customer, and contractual obligations have clear owners.	☐	☐	☐	_____

6. Leadership Capacity & Team Effectiveness

Leadership statement	Yes	Partly	No	Owner / notes
Executives have enough time for strategy, coaching, and high-value decisions.	☐	☐	☐	_____
Key decisions do not routinely stall because ownership is unclear or leaders are overloaded.	☐	☐	☐	_____
The team has access to experienced executive guidance for unfamiliar or high-risk initiatives.	☐	☐	☐	_____
Succession and backup coverage exist for critical leadership responsibilities.	☐	☐	☐	_____
The cost of missing expertise is weighed against full-time, interim, advisory, and fractional options.	☐	☐	☐	_____

Scoring Summary

Transfer each section score below. Each section has a maximum of **10 points**.
The overall maximum is **60 points**.

Assessment area	Score	Priority	Key gap / action
Strategic Direction & Executive Ownership	___ / 10	☐ High ☐ Med ☐ Low	_____
Technology Leadership & Digital Readiness	___ / 10	☐ High ☐ Med ☐ Low	_____
Operational Leadership & Execution	___ / 10	☐ High ☐ Med ☐ Low	_____
Financial Governance & Decision Support	___ / 10	☐ High ☐ Med ☐ Low	_____
Cybersecurity, Risk & Business Resilience	___ / 10	☐ High ☐ Med ☐ Low	_____
Leadership Capacity & Team Effectiveness	___ / 10	☐ High ☐ Med ☐ Low	_____
Total	___ / 60		

Interpretation Guide

46-60 Strong foundation	Leadership coverage is generally strong. Focus on isolated gaps, succession, and strategic acceleration.
31-45 Emerging gaps	Several capabilities are inconsistent. Prioritize the gaps tied to near-term growth, risk, or major initiatives.
0-30 Material capacity risk	Leadership gaps may be slowing decisions or execution. Consider immediate executive support and a focused action plan.

Top 3 Leadership Gaps

1. Gap: _____

Recommended owner / support: _____

Business impact: _____

Target date: _____

2. Gap: _____

Recommended owner / support: _____

Business impact: _____

Target date: _____

3. Gap: _____

Recommended owner / support: _____

Business impact: _____

Target date: _____

90-Day Leadership Gap Action Plan

Use this page to convert the assessment into a short, accountable plan. Select the support model based on urgency, duration, internal capability, and budget.

Priority gap	Desired outcome	Support model	Owner	30/60/90-day milestone
		☐ Internal ☐ Advisor ☐ Fractional ☐ Interim ☐ Full-time		30: 60: 90:
		☐ Internal ☐ Advisor ☐ Fractional ☐ Interim ☐ Full-time		30: 60: 90:
		☐ Internal ☐ Advisor ☐ Fractional ☐ Interim ☐ Full-time		30: 60: 90:
		☐ Internal ☐ Advisor ☐ Fractional ☐ Interim ☐ Full-time		30: 60: 90:
		☐ Internal ☐ Advisor ☐ Fractional ☐ Interim ☐ Full-time		30: 60: 90:

Suggested next step

Schedule a complimentary NorthernEdge Leadership Readiness Assessment to validate the priority gaps, identify initiative risk, and determine whether fractional CIO, CFO, COO, or CEO support is the right fit.

Assessment notes

This checklist is a planning tool and not a legal, financial, cybersecurity, or compliance audit.