



# STRATEGIC PLANNING

for  
Accounting Firms

## The BIG IDEA

Engaging in an effective strategic planning process will help firms prepare for the future, develop action plans, tackle difficult issues and discuss partner succession.

The accounting landscape is quickly changing! Firms need to deal with a host of challenges like staff shortages, partner retirement, technology, growth, fee pressures and regulatory changes just to name some. A solid strategic planning process will help firms deal with all of these issues and more. We believe in a three-stage approach:

**STAGE 1 - Pre-Retreat Activities:** Conducting a retreat does not “happen in a vacuum” and, accordingly, we believe it is crucial to conduct due diligence in advance of the retreat. Stage 1 allows us to gather information about your firm so we may begin developing an understanding of your financial situation, compensation plans, HR environment and other matters that can directly and indirectly affect your retreat.

**STAGE 2 - Retreat Facilitation:** We will actively facilitate your retreat. We use the word active because we don’t simply try to draw the solutions out of your group, we will tap into our decades of experience in the accounting profession and suggest best practices and proven ideas and activities. The retreat is typically a 1 - 1.5-day process that should take place off-site.

**STAGE 3 - Post-Retreat Activities:** During Stage 3, we will finalize and document the retreat discussions. If necessary, we will work with members of your team via email and telephone to put the finishing touches on an action plan. Stage 1, 2 and 3 all work together to develop a plan that maximizes the firm’s chances of IMPLEMENTING the agreed upon strategic goals.

**Depending upon the special situation of each firm, deliverables may include:**

- Mission statement
- Value statements
- One-year action plan
- Five-year vision
- Overall documentation of retreat discussions
- One-page strategic plan overview which can be shared with the entire firm

Don’t wait, contact us now to schedule a discussion about your strategic planning needs!

- Investment:** \$15,000 – \$25,000 (depending on scope)
- Delivery:** 1–1.5 day strategic session
- Includes:** Pre-work, retreat and documentation



*“Working with The Growth Partnership on our strategic plan has helped our firm tremendously. Using their process he has helped get our partners, and ultimately our entire firm, on the same page...literally! The process provides us with a long-term view of our firm as well as a 1-year action plan. However, one of the most important aspects is the accountability process. The engagement didn’t end after the initial strategy session as we have quarterly check-ins to keep our team engaged and action items moving forward. Because of the pandemic we actually conducted one of our sessions virtually and it was just as effective as our live check-ins. Finally, their deep expertise in the accounting profession really helped make the engagement that much more effective.”*

**Skeet Haag, CPA**  
Managing Partner  
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