



# Know Where You're Going — Leadership Clarity Worksheet

Get aligned on what success means, where growth is realistically possible, and what it will take to get there, so you can define the marketing function needed to support the firm's goals.

## 1 What Does Success Mean This Year?

**Define success in one clear sentence:**

*Example: "Grow firm revenue by 12% by strengthening CAS and expanding advisory services within our existing client base."*

Your sentence:

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What is the firm's growth target?

Revenue goal: \$\_\_\_\_\_or\_\_\_\_\_%

If not revenue-driven, what metric defines success?

## 2 Where Is Growth Actually Possible?

(This step determines your real opportunities before you declare where growth "will" come from.)

**Which areas have the strongest potential to grow this year?**

(Check or list.)

- ☐ Tax
- ☐ CAS / Outsourced Accounting
- ☐ Advisory
- ☐ Audit
- ☐ Industry niche(s): \_\_\_\_\_
- ☐ Specific client segments: \_\_\_\_\_
- ☐ Other opportunities: \_\_\_\_\_

Why do you believe these areas can grow?

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### Capacity & Constraints (Evaluate Reality Before Committing)

Do we have the capacity to deliver growth in the areas identified above?  
Use: Green (capacity), Yellow (strained), Red (no capacity)

Area	Status	Notes
Tax	<input type="checkbox"/> G <input type="checkbox"/> Y <input type="checkbox"/> R	
CAS	<input type="checkbox"/> G <input type="checkbox"/> Y <input type="checkbox"/> R	
Advisory	<input type="checkbox"/> G <input type="checkbox"/> Y <input type="checkbox"/> R	
Audit	<input type="checkbox"/> G <input type="checkbox"/> Y <input type="checkbox"/> R	
Onboarding capacity	<input type="checkbox"/> G <input type="checkbox"/> Y <input type="checkbox"/> R	
Partner/manager time for BD	<input type="checkbox"/> G <input type="checkbox"/> Y <input type="checkbox"/> R	

If anything is Yellow/Red, how does that limit growth?

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### Leadership Strength & Ownership

Do we have the right leadership in place to support growth in the areas identified?

Strong leadership in growth areas?

☐ Yes ☐ No ☐ Mixed

If gaps exist, where?

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Where will leadership attention be required to enable growth?

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## Where Will the Growth Come From (Now Document the Decision)

Now that capacity and opportunity are clear, capture your expected growth mix.

Approximate the proportion of growth expected from:

New clients: \_\_\_\_\_%

Expanding services to existing clients: \_\_\_\_\_%

Pricing adjustments: \_\_\_\_\_%

Growth by service line:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Which **ONE** source will be the primary driver this year?

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## Alignment Check

How aligned is the partner group on:

- What success means
- Where growth is possible
- The areas the firm will prioritize
- The leadership needed to support growth

**Circle one:**

**1 2 3 4 5 6 7 8 9 10**

*(1–3 = low alignment, 4–7 = partial, 8–10 = strong)*

Where do alignment gaps remain?

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## 7 Priority Actions (Next 90 Days)

What are the top five priorities for the next 90 days that will help the firm move toward the growth goals you've defined?

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With these answers clarified, you now have the strategic foundation required to build a marketing strategy that aligns with your goals, capacity, and the areas of growth you've identified.

If you'd like support completing this worksheet or want a second set of eyes on your answers, you're welcome to schedule a complimentary clarity consultation.



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