LONG-TERM SUSTAINABLE GROWTH

Module 6: Innovation and Expension

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Long-Term Sustainable Growth Planning Workbook

This workbook is designed to help you map out the long-term direction of your accounting firm — strengthening profitability, improving capacity, reducing risk, and building a practice that can scale sustainably over the next 3–5 years.

By completing the exercises in this workbook, you'll create a clear, actionable plan that aligns your strategy, people, operations, technology, and financial goals, enabling you to grow with confidence and build a more resilient, valuable firm.

Instructions

- **Clarify Your Long-Term Vision:** Begin by defining where you want your firm to be in the next 3–5 years. Consider the type of clients you want to serve, the services you want to expand, how large you want the firm to become, and what role you want to play within it. A clear vision anchors every strategic decision.
- **Assess Your Strategic Position:** Outline your current strengths and weaknesses across client mix, pricing, operations, technology, people, and financial performance. This will help you identify the levers that will drive sustainable growth.
- **Plan for Capacity & People Development:** Evaluate your current team structure and future staffing needs. Consider leadership development, succession planning, delegation, outsourcing options, and how you can build capacity without over-reliance on key individuals.
- **Strengthen Your Operations & Technology:** Identify the processes and systems that must evolve to support long-term growth. Consider automation, workflow redesign, data quality, and creating standardised systems that scale efficiently.
- **Forecast & Model Future Growth:** Set measurable goals and build financial scenarios for the next 1–3 years. Consider revenue targets, EBITDA improvements, investment needs, pricing strategy, and how different growth paths affect resources and profitability.
- **Enhance Client Value & Revenue Quality:** Assess opportunities to improve client retention, increase recurring revenue, specialise in a niche, and expand higher-value advisory services. Sustainable growth relies on strong, predictable revenue streams.
- **Plan for Risk & Resilience:** Identify potential risks to your long-term growth — market changes, technology shifts, staffing challenges, client concentration, compliance — and outline practical mitigations to strengthen your firm's resilience.
- **Set SMART Priorities & Review Cycles:** Create a structured growth plan with clear 12-month goals, quarterly milestones, and monthly review rhythms. A consistent execution cycle will ensure your long-term strategy stays on track.

By the end of this workbook you'll have a practical, long-term growth plan that aligns strategy, people, operations, technology, and finances — giving you a roadmap to build a stronger, more profitable, and more valuable accounting firm.

This structured approach will help you make decisions confidently, adapt proactively, and create sustainable success year after year.

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Section 1: Strategic Position & Current Value Drivers

Write your firm's current strategic direction (niche, generalist, hybrid) and 1–2 long-term goals.

List 3 areas where your firm already performs well (e.g., recurring revenue, strong retention, efficient systems, advisory growth).

List all the constraints slowing growth in your firm (e.g., capacity limits, owner dependency, system fragmentation, pricing).

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Section 2: Enhancing EBITDA

Write 3 processes you can systemise, automate, or streamline to improve efficiency and margin.

Write 2 ways your team structure could evolve to support sustainable growth (e.g., delegation, hiring pathway, outsourcing).

Identify the technology or data upgrades that would enable scale over the next 12–36 months.

Section 3: Expanding Recurring Revenue & Advisory Value

List existing services you could convert to fixed-fee or subscription models.

List any advisory services that align with your long-term strategy and could increase EBITDA.

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Fully plan one recurring or advisory improvement you can begin implementing in the next 30 days.

Section 4: Reducing Risk & Owner Dependency

List the tasks or decisions that currently rely only on you (or one senior team member).

Write one process you can document and one responsibility you can delegate in the next 60 days.

Identify any major risks (client concentration, compliance, capacity, market shifts) and note how you could mitigate them.

Section 5: Client Base & Long-Term Revenue Quality

List any clients who make up more than 5–10% of revenue and note one action to reduce dependence.

Write 2 improvements you can make to client experience or communication to support long-term retention.

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Plan a campaign or change that will strengthen your firm's authority, visibility, or niche positioning over the next 12 months.

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Section 6: Forecasting, Exit Readiness & Future Planning

Write a short paragraph describing what you want your firm to look like in three years (team, revenue mix, systems, advisory, client base).

Write two possible future scenarios (one positive, one challenging) and how your firm would respond.

From the areas below, note where you're strong and where you need improvement:
Documented processes, Clean financials, Leadership succession, Predictable recurring revenue, System maturity, Risk diversification.

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Section 7: Your Growth-to-Exit Action Plan

List the three improvements that will have the biggest impact in the next 90 days.

Write the one action you will start this week to move toward a more efficient, scalable, and valuable firm.

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Congratulations on Completing Your Long-Term Sustainable Growth Planning Workbook!

You've taken important steps to move your firm from reacting to the present to intentionally shaping the future — clarifying your long-term vision, strengthening your strategic position, evaluating your operational and capacity needs, planning for financial resilience, and identifying the actions that will drive sustainable value over the next 3–5 years.

Here's What to Do Next

- **Review What You've Built:** Look back over your strategic goals, capacity plans, operational priorities, and financial scenarios. Which actions will make the greatest difference in strengthening profitability, reducing risk, and positioning your firm for long-term success? Prioritise those first.
- **Set Clear Annual and Quarterly Objectives:** Choose the goals you will focus on over the next 12 months and break them into quarterly milestones. Define what success looks like — for example, "systemise all core workflows by Q3" or "increase recurring revenue by 20% within 12 months." Establish a realistic, trackable plan.
- **Create a Repeatable Execution Rhythm:** Outline how your firm will review progress: monthly leadership check-ins, quarterly strategy reviews, and annual planning cycles. Consistent execution — not big one-off actions — is what builds long-term resilience.
- **Communicate Your Plan Internally:** Share your growth priorities with your team so everyone understands the direction of the firm and their role in achieving it. Clear communication builds alignment, accountability, and momentum.
- **Collect Feedback and Adapt:** As you begin implementing your plan, review what's working, where bottlenecks appear, and what needs refining. Sustainable growth is iterative — each cycle of feedback helps you strengthen your foundations.
- **Think Ahead:** Once your initial priorities are underway, look beyond the next year. Should you expand advisory services? Invest in automation? Specialise further in a niche? Explore M&A or succession planning? Long-term planning becomes easier and more powerful as your systems mature.

Final Thoughts

Long-term sustainable growth isn't about doing everything at once — it's about choosing the right priorities, executing consistently, and building a firm that becomes stronger year after year. You now have a structure, strategy, and roadmap to guide the next stage of your firm's evolution.

Don't wait for the "perfect" moment — start implementing, track your progress, refine your approach, and let each step compound over time. The firms that plan deliberately and execute consistently are the ones that thrive in the future of the profession.

Join the Going Global Newsletter for more updates, tips and content to learn how to start, build and scale your accountancy firm.

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Additional Notes

Please use this section to fill in the most important points and any other notes or ideas you have about your Growth Action Plan.