SAMPLE GROWTH STRATEGY GUIDE

A practical baseline for building focused, measurable, and sustainable business growth.

USE THIS GUIDE TO

Clarify where your business is going

Identify the few growth priorities that matter most

Turn strategy into a 90-day action plan

Track progress with simple, decision-ready metrics

Designed for owners, leadership teams, and growing organizations that need a clear starting point - not a one-size-fits-all prescription.

How to Use This Guide

Growth becomes more manageable when it is translated into a small set of choices, measurable outcomes, and consistent operating rhythms. This guide provides a universal framework that can be adapted to most industries, business models, and stages of development.

1. Assess	Understand the current state using facts, trends, and stakeholder input.
2. Choose	Select a limited number of priorities and explicitly deprioritize distractions.
3. Execute	Translate priorities into owners, milestones, resources, and weekly actions.
4. Review	Use a simple scorecard to learn, adjust, and keep the team aligned.

> **A useful growth strategy is specific enough to guide decisions and flexible enough to evolve. Revisit this guide quarterly, and complete a deeper refresh annually or whenever market conditions, leadership, ownership, or the business model changes materially.**

Guide at a Glance

01	Define the Growth Ambition
02	**Assess the Current State**
03	**Choose Strategic Growth Priorities**
04	**Build the Growth Engine**
05	**Strengthen the Operating Foundation**
06	**Create the Financial Plan**
07	**Activate the 90-Day Roadmap**
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01 Define the Growth Ambition

Start with a clear destination. Growth should improve the value, resilience, and impact of the business - not simply make it busier.

Write a three-year growth ambition that answers four questions:

Dimension	Guiding Question
Scale	What level of revenue, profit, customers, locations, market share, or enterprise value are we aiming to reach?
Position	What should customers and the market know us for?
Capabilities	What must the organization become exceptionally good at?
Impact	What should growth create for customers, employees, owners, and the community?

Sample growth ambition

> **Over the next three years, we will build a more predictable and profitable business by focusing on our highest-value customers, expanding recurring revenue, strengthening leadership capacity, and creating consistent processes that allow the company to grow without depending on heroic effort from a few individuals.**

Decision filters

- Does this opportunity serve our target customer and reinforce our desired market position?
- Can we deliver it profitably and consistently?
- Does it build a repeatable capability, or create one-time complexity?
- What must we stop, delay, or simplify to pursue it well?

02 Assess the Current State

A strategy should begin with evidence. Separate facts from assumptions and identify the constraints most likely to limit growth.

Assessment Area	What to Examine
Market & Customer	Customer needs, segments, competitors, market shifts, reputation
Marketing & Sales	Lead generation, conversion, pipeline quality, sales cycle, retention
Operations	Process consistency, capacity, technology, quality, delivery speed
Financial	Revenue mix, margins, cash flow, pricing, forecasting, capital needs
People & Leadership	Roles, accountability, skills, culture, succession, decision speed
Risk & Resilience	Customer concentration, compliance, supplier dependence, cyber, continuity

Create a simple fact base

- Last 24-36 months of revenue, gross margin, operating profit, and cash flow trends
- Revenue and profitability by product, service, customer, channel, and geography
- Lead sources, conversion rates, sales-cycle length, win/loss reasons, and pipeline coverage
- Retention, repeat purchase, customer satisfaction, complaints, and referral patterns
- Capacity, utilization, delivery time, rework, quality, and employee turnover
- Competitive changes, regulatory shifts, technology trends, and customer behavior changes

> **End the assessment with a concise summary: three strengths to leverage, three constraints to remove, three opportunities to test, and three risks to manage.**

03 Choose Strategic Growth Priorities

Most businesses do not suffer from a lack of ideas. They suffer from too many priorities competing for the same time, money, and attention.

Common growth pathways

Deepen the Core: Increase penetration, conversion, retention, pricing, or share of wallet in current markets.

Expand Offerings: Add adjacent services, products, bundles, subscriptions, or premium tiers.

Enter New Markets: Pursue new customer segments, channels, geographies, or strategic partnerships.

Improve Economics: Raise margins through pricing, mix, productivity, automation, or procurement.

Build Capacity: Develop leadership, talent, systems, capital, or infrastructure required for scale.

Priority scoring matrix

Initiative	Impact	Confidence	Effort	Decision
________________	____	____	____	____
________________	____	____	____	____
________________	____	____	____	____
________________	____	____	____	____
________________	____	____	____	____

> **Limit the active strategy to three to five priorities. Every priority should have a measurable outcome, accountable owner, resource commitment, and explicit trade-off.**

04 Build the Growth Engine

Sustainable growth requires a repeatable system for attracting the right prospects, converting demand, retaining customers, and expanding value.

1. Target	Define the ideal customer, priority problem, buying trigger, and disqualifying criteria.
2. Position	Clarify the promise, evidence, differentiation, and reasons to choose now.
3. Attract	Use focused channels and useful content to create awareness and demand.
4. Convert	Standardize qualification, discovery, proposal, follow-up, and close management.
5. Deliver	Create a consistent onboarding and customer experience that fulfills the promise.
6. Retain & Expand	Measure outcomes, prevent churn, generate referrals, and identify expansion opportunities.

Core growth engine metrics

- Qualified opportunities created
- Conversion rate by funnel stage
- Average deal or order value
- Sales-cycle length
- Customer acquisition cost
- Gross margin by offering
- Retention or repeat-purchase rate
- Referral and expansion revenue

> **Choose channels based on where your target customers already seek information and make decisions. Consistency in a few relevant channels usually outperforms scattered activity across many channels.**

05 Strengthen the Operating Foundation

Growth exposes weak processes. Before adding volume, make sure the organization can deliver quality consistently and profitably.

Operating readiness checklist

☐ Core processes are documented at a practical level

☐ Roles, decision rights, and handoffs are clear

☐ Capacity and workload are visible

☐ Quality standards and customer commitments are measurable

☐ Technology reduces friction rather than adding duplicate work

☐ Leadership meetings focus on decisions, accountability, and obstacles

☐ Critical knowledge is not held by only one person

☐ Hiring and training plans are linked to the growth roadmap

Scale in this order

Simplify: Remove low-value steps, offerings, reports, meetings, and exceptions.

Standardize: Define the best current way to perform repeatable work.

Automate: Use technology after the process is understood and stable.

Delegate: Assign clear ownership with the authority and information to succeed.

Expand: Add people, locations, equipment, or capital only when the model is ready.

06 Create the Financial Plan

A growth strategy is incomplete without an economic model. Translate initiatives into revenue, margin, cash, capacity, and investment assumptions.

Build three scenarios

Scenario	Revenue Assumption	Investment Level	Purpose
Base	Expected performance with current plans	Committed	Operating plan and cash needs
Upside	Stronger conversion, demand, or capacity	Conditional	Triggers for accelerating investment
Downside	Slower sales, delays, or margin pressure	Protected	Early actions to preserve cash and focus

Financial questions every initiative must answer

- What revenue, margin, or strategic benefit should this create?
- What one-time and ongoing investment is required?
- When will cash leave the business, and when should returns begin?
- What capacity constraint could limit the result?
- What assumptions must be true for the initiative to work?
- What trigger will cause us to continue, modify, pause, or stop?

> **Avoid using revenue alone as the definition of success. Growth that weakens margin, cash flow, customer experience, or organizational stability may destroy value.**

07 Activate the 90-Day Roadmap

Execution improves when strategy is broken into short cycles with clear owners, milestones, and review rhythms.

The 90-day planning structure

Outcome	Key Actions	Owner	Milestone	Measure

Suggested operating rhythm

Weekly: Review key metrics, commitments, blockers, and decisions. Keep the meeting action-oriented.

Monthly: Review financial performance, pipeline, capacity, initiative progress, and emerging risks.

Quarterly: Reassess priorities, allocate resources, stop low-value work, and launch the next 90-day cycle.

Annually: Refresh the growth ambition, strategic choices, financial model, talent plan, and risk outlook.

> **Every action should have one accountable owner. Contributors may be many; accountability should not be shared or ambiguous.**

08 Track Results and Adjust

A scorecard should help leaders make decisions, not merely report activity. Track a small set of leading and lagging indicators.

Balanced growth scorecard

Perspective	Example Measures
Growth	Qualified pipeline, win rate, new revenue, expansion revenue
Customer	Retention, satisfaction, referrals, complaints, time to value
Financial	Gross margin, operating profit, cash flow, working capital
Operations	Cycle time, utilization, productivity, quality, rework
People	Key-role retention, hiring progress, engagement, training, succession
Strategic	Milestone completion, experiment results, capability development

Metric design rules

- Use 8-12 enterprise-level measures, not dozens.
- Include both leading indicators and business outcomes.
- Define the owner, formula, data source, frequency, target, and threshold for each metric.
- Discuss exceptions and decisions rather than reading every number aloud.
- Change metrics only when the strategy or business model changes - not to avoid accountability.

09 Worksheets and Templates

Use these pages to convert the framework into a practical working plan for your business.

Worksheet A - One-Page Growth Strategy

Three-Year Growth Ambition

Target Customers and Markets

Our Differentiated Value Proposition

Top 3-5 Strategic Priorities

Capabilities We Must Build

What We Will Stop or Deprioritize

12-Month Outcomes

Primary Risks and Mitigations

Worksheet B - Initiative Charter

Initiative Name	
Business Problem or Opportunity	
Desired Outcome	
Success Measures	
Executive Sponsor	
Accountable Owner	
Key Milestones	
Required Resources	
Dependencies	
Risks and Mitigations	
Decision Triggers	
First Five Actions	

Worksheet C - Monthly Growth Scorecard

Metric	Owner	Target	Actual	Trend	Status	Action

Status key: Green = on track; Yellow = attention required; Red = corrective action or decision required.

Your Next Step

A useful strategy is not measured by the quality of the document. It is measured by the clarity of decisions, consistency of execution, and improvement in business results.

Start with these three actions:

1. Schedule a 90-minute leadership session to complete the current-state assessment.
2. Select no more than three growth priorities for the next 90 days.
3. Assign owners, define measures, and begin a weekly review rhythm.

NEED A MORE TAILORED GROWTH PLAN?

DeltaPoint Partners helps organizations clarify growth opportunities, strengthen execution, and build practical strategies aligned to their goals, market, and operating realities.

Visit the DeltaPoint Partners website to learn more.