

# Building the First Strategic Plan for a Growing Services Practice

## Client Overview

**Sector:** Public Accounting  
**Industry:** Professional Services  
**Location:** Alaska  
**Annual Revenue:** Over \$15 mil

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## Background

A mid-sized professional services firm with a growing client accounting and advisory services practice had been in existence since 2018 but without a roadmap. The team was seeking direction and structure to scale effectively, align on priorities, and support both internal growth and client success.

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## Key Challenges

- Needed guidance for department development
  - Operational consistency improvement required
  - Needed better alignment of services with the broader goals of the firm
  - Lack of time and facilitation expertise
  - Services in high demand but no framework to guide expansion, manage resources strategically or integrate new technology effectively.
  - Leadership recognized need for a roadmap to formalize priorities, improve scalability, and engage stakeholders at all levels.
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## The Solution

The department partnered with Heather Garland, founder of Synergy Pathfinders, to lead the development of their first-ever strategic plan. The approach was collaborative, transparent, and grounded in qualitative and quantitative insights.

### 1. Annual Retreat Facilitation

- Facilitated a series of structured discussions during the 2024 and 2025 annual retreats

- Encouraged open dialogue among team members, surfacing challenges and capturing aspirations for the future of the department
- Staff helped co-create vision, mission, and objectives, leading to strong buy-in and alignment

## **2. Input Gathering & Alignment**

- Led a SWOT analysis and stakeholder mapping to understand internal dynamics, service capacity, external threats and market opportunities, including expansion and the use of AI and outsourced talent
- Using insights from the retreats, synthesized team input
- Facilitated follow-up sessions (including quarterly strategic planning meetings) to prioritize initiatives and ensure cross-functional alignment

## **3. Strategic Planning Framework Development**

- Introduced tailored strategic planning framework and crafted 5-year strategic plan that focused on four pillars:
  - Technology investment (including AI integration)
  - Geographic and service expansion
  - Revenue growth
  - Workforce development and process standardization
- Built 5-year roadmap with defined initiatives, leads, KPIs, and budgets
- Introduced phased AI integration plan to support automation, fraud detection, and advanced analytics to pave the way for smarter advisory services and improved scalability

## **5. Ongoing Advisory and Oversight**

- Facilitates quarterly department strategic planning meetings
- Monitors and reports success metrics on a recurring basis, including dashboard reporting

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## **Results**

- The plan provides a clear direction for leadership and staff, including measurable KPIs and quarterly accountability check-ins.
- Developed through annual retreats and team input, the plan reflects departmental identity and values, helping with morale and engagement.
- Revenue targets, staffing plans, and cost controls are linked through the plan and budget, aligning operations with financial performance
- The department is actively piloting AI tools, investing in staff training, and migrating low-value work to outsourced teams to focus on high-impact services.

By facilitating a collaborative and structured strategic planning process, the client accounting and advisory services team moved from reactive operations to proactive leadership. This strategic plan now serves as the foundation for growth, innovation, and service excellence.

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## **Take the Next Step**

Looking to bring clarity and direction to your team? Partner with Synergy Pathfinders to develop a strategic plan aligning your team, streamlining operations, and driving results.

Contact us today to get started.