

THE Organic Growth Playbook™

A Facilitated Planning Guidebook for Advisory Firm Leaders



— Est. 2006 —

Name:

Date:

About ClientWise LLC



ClientWise is the premier business and executive coaching firm working exclusively with financial professionals.

We specialize in helping clients optimize growth and maximize revenue by engaging as a knowledgeable partner in accomplishing specific and significant business results.

Our full-service coaching program empowers financial advisors, wholesalers, managers and executives to enhance performance through customized, action-oriented solutions based on each client's specific vision and situation.

Our certified coaches are members of the International Coaching Federation (ICF). They adhere to ICF's strict code of ethics and have the experience and insight to work with you on the unique challenges and opportunities you face each day.

Drawing from an in-depth knowledge of the financial industry, ClientWise's mission is to professionally develop industry leaders and consistently raise the bar for industry service, commitment and integrity. Simply put, our singular focus is to help you **get clear, get focused, and get results.**

Growth by Design, Not Default

Why this playbook exists and how to use it

Most advisory firms believe they are committed to growth. Ask the leadership team, and they will tell you growth is a priority. Look at the calendar, the compensation structures, the marketing budget, and the weekly conversation in the boardroom — and you often find something different. Growth is hoped for. Growth is expected. But growth is not led.

The best in the business are different. Their leaders are unambiguous about why growth matters — to the firm's sustainability, to provide careers for all team members, and to the clients who deserve a firm that is investing in its own future. And that clarity creates alignment. It moves from the owners to the team. It shows up in how people spend their time, what gets funded, what gets measured, and what gets celebrated.

Organic growth is not a market condition. It is a leadership decision. Every advisory firm eventually faces the same questions: How fast should we grow, which types of clients should we attract in the future, and how? The firms that consistently outperform their peers are not smarter or luckier. They grow intentionally — through deliberate strategy, disciplined execution, and systems that outlast any individual advisor or favorable market cycle. They have an organic growth playbook.

This playbook works in concert with two ClientWise self-assessments — The Essential Elements of the Marketing Approach™ and The Leadership Discipline of Growth™. Complete both assessments before working on this organic growth playbook. The scores from those tools inform every section of this playbook: the metrics you prioritize on your dashboard, the objectives you commit to, and the workstreams you choose to fund with your time and resources.

How to Use This Playbook

Complete The Essential Elements of the Marketing Approach™ and The Leadership Discipline of Growth™ before completing this playbook. Bring your scores. Work through each section in sequence. To make the best use of this playbook, complete each table and worksheet up front and then make adjustments throughout the year. The coaching questions at the end are designed for after the planning work is done — when the team can genuinely feel the weight and possibility of what they've committed to.

The From-To Leadership Narrative

Before reviewing any data or setting any objectives, let's explore the story the leadership team is telling itself about why the firm is growing — or not. Most firms attribute growth to market conditions, long-tenured relationships, or advisor quality. High-performing firms attribute growth to systems and discipline. The mindset shift from reactive to intentional is the most important outcome this work needs to produce.

If your firm isn't honest about the current state of growth within your firm, and aligned around a shared vision of growth, none of the planning work will stick.

The From-To Leadership Narrative

TODAY

Where does our growth come from? How would various team members describe our vision of growth today?

THE FUTURE

Where will our growth come from? What is our future vision of growth?

1

The Organic Growth Dashboard™

Your firm's vital signs — current metrics, benchmarks, and annual targets

This dashboard is your firm's single source of truth for organic growth performance. The metrics below reflect the indicators that most consistently differentiate high-performing advisory firms from their peers. Populate the rows before the planning session begins. Where data is not currently tracked, mark it as 'Not tracked' — that itself is a strategic finding.

The bottom rows are yours to customize. Add the metrics that matter most to your firm's specific growth strategy — whether that is a productivity measure, a client segment metric, or a channel-specific acquisition cost.

The Organic Growth Dashboard™

Growth Metric	Industry Benchmark	Our Current Actual	Our Annual Target
1. Organic Growth Rate (YOY) - From existing clients (e.g., additional assets, new revenue)	Excluding market appreciation & M&A		
2. Organic Growth Rate (YOY) - From acquiring new clients (e.g., new assets, new revenue)			
3. Net New Assets (YTD)			
4. Net New Revenue			
5. Operating Margin Goal - Current Year	High-performing firm (HPF) benchmark: 26%		
6. Revenue per Advisor	High-performing firm (HPF) benchmark: ~\$1.35M		
7. Revenue per Client Relationship by various segments	Set internally		
8. Net New Clients (YTD)	Set from growth objective		
9. Average AUM — New Clients	Set from Ideal Client Profile (ICP) definition		
10. Client Attrition Rate	<5% annually		
11. Lifetime Total Relationship Value™ (LTRV)			
12. Active Total Relationship Value™ (ATRV) over rolling 3-years			
13. Referral Close Rate	High-performing firm (HPF) benchmark: >70%		
14. Client Acquisition Cost (CAC)	Track by channel		
15. COI Introductions Made (YTD)/Received (YTD)	Track quarterly vs. prior year		
16.			
17.			
18.			
19.			
20.			

Notes:

Dashboard Debrief

1. Which metric in this dashboard is most surprising to you, and what does that surprise reveal about what you have not been measuring?
2. Where is the largest gap between your current performance and your aspiration? What has allowed that gap to persist?
3. Which metric, if it significantly improved over the next 12 months, would have the greatest compound effect on your enterprise value?
4. Which metrics are you not currently tracking — and what decisions are you making blind as a result?

Objectives & Key Results

Company objectives, department child objectives, and workstreams

Objectives are outcome-oriented, aspirational, and time-bound. They answer: What do we want to be true at the end of this planning period? **Key Results** are specific, measurable, and binary — you either hit them or you don't. They answer: How will we know we achieved the objective?

Each company objective cascades to three department child objectives — one each for Marketing, Business Development, and Client Engagement. Every child objective should be directly traceable to the company objective it serves, and each has its own key results that prove it was achieved. Consider whether or not you want to organize your OKRs around these three areas, or choose your own.

Every objective must be an outcome, not an activity:

'Launch a YouTube channel' is not an objective — 'Generate 20 qualified prospect conversations from digital content by Q4' is.

Hold your team to outcome language until every objective passes this test: *If we achieve this, what is materially different about our firm?*



Marketing Department OKRs

Brand, campaigns, content, digital, COI marketing



Business Development OKRs

Prospecting, pipeline, referral activation, COI cultivation



Client Engagement OKRs

Client experience, advocacy, service model, retention

1 Company Level Objective		Owner:	Target Date:
Objective:			
KR	Company-Level Key Results: <i>How will we know we achieved this objective?</i>		

 Marketing Department Objective	Owner:	Target Date:
Objective:		
KR1		
KR2		

 Business Development Objective	Owner:	Target Date:
Objective:		
KR1		
KR2		

 Client Engagement Objective	Owner:	Target Date:
Objective:		
KR1		
KR2		

2 Company Level Objective		Owner:	Target Date:
Objective:			
KR	Company-Level Key Results: <i>How will we know we achieved this objective?</i>		

 Marketing Department Objective	Owner:	Target Date:
Objective:		
KR1		
KR2		

 Business Development Objective	Owner:	Target Date:
Objective:		
KR1		
KR2		

 Client Engagement Objective	Owner:	Target Date:
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KR2		

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Objective:		
KR1		
KR2		

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Objective:		
KR1		
KR2		

 Client Engagement Objective	Owner:	Target Date:
Objective:		
KR1		
KR2		

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Objective:		
KR1		
KR2		

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KR2		

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Objective:		
KR1		
KR2		

 Client Engagement Objective	Owner:	Target Date:
Objective:		
KR1		
KR2		

Workstream Priority Worksheet™

List all workstreams that emerge from the OKRs listed on the previous pages. Rate each by effort and impact as high, medium, or low. Assign a priority rank — the highest-impact, lowest-effort workstreams execute first.

	Workstream/ Project Name	Linked Objective/Owner	Assessment Gap It Closes	Effort	Impact	Priority Rank
1				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
2				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
3				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
4				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
5				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
6				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
7				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
8				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
9				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
10				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
11				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	
12				☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	

12-Month Workstream Timeline™

Check the months during which each workstream will be actively executed.
Mark the lead owner. Use the status key: **N** = Not Started **WIP** = Work in Progress, **X** = Complete

	Workstream	Lead	Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
2				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
3				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
4				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
5				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
6				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
7				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
8				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
9				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
10				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
11				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
12				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Project Charters — Top Priority Workstreams™

Complete a project charter for each top-priority workstream. This is the contract between the workstream lead and the leadership team — it defines success, team, milestones, and escalation before the session ends.

Workstream Project Charter	Name: _____ Lead: _____
Linked Objective & Key Result Which company or child objective does this workstream serve?	
What Does Success Look Like? Define what 'done' means — specifically and measurably.	
Team Members Involved Who else needs to contribute to this workstream?	
Key Milestones 3–5 milestone dates between start and completion.	
Dependencies What must be true, or happen first, for this workstream to proceed?	
Check-In Cadence Weekly / Bi-weekly / Monthly	
Escalation Owner:	

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Check-In Cadence Weekly / Bi-weekly / Monthly		
Escalation Owner:		

Accountability Architecture

The most common reason growth plans fail is not poor design. It is that no one was accountable for the decisions that needed to be made when reality diverged from the plan.

Meeting	Duration	Attendees	Agenda	Decision Rights
Monthly Growth Review	30 min	Leadership team	Dashboard metrics, workstream status, blockers	Adjust resources; escalate stalled workstreams
Quarterly OKR Check-In	90 min	Leadership team + workstream leads	OKR progress, key result scoring, child objective review	Revise targets; reallocate budget or capacity
Annual Planning Reset	Half day	Full leadership team	Re-score both assessments, set new OKRs, update playbook	Set next year's objectives and growth targets

Commit to review cadence before anyone leaves the room.

30-Day Check-In Date:	Quarterly OKR Check-In Date:
Monthly Review Owner:	Annual Planning Reset Date:

Coaching Questions

Future-oriented reflection for leaders & their teams

These questions are not retrospective. They are not a gap analysis. They are designed for use after the planning work is done — when the leadership team can genuinely feel the weight and possibility of what they have just committed to. Use them with your team, in individual coaching sessions, or as a reflective exercise for team members at any level.

Allow silence. The best answers to these questions take a moment to find.

1 The Firm You Are Building

If these objectives, key results, and workstreams were fully executed over the next 12 months, what would be most different about your firm? What would you be most proud of?

2 The Client You Would Attract

If your marketing approach and growth systems were operating at the level you've committed to, what kind of client would be drawn to your firm — and how is that different from the client you are attracting today?

Notes:

3 The Team You Would Need

What would your team need to look like — in skills, roles, culture, and capacity — to sustain the growth you've outlined? What gaps exist today between that team and the one you have?

4 The Leader You Would Become

What shifts in how you lead — your time allocation, your decisions, your delegation, your accountability — would be required to achieve or exceed this plan? What would you need to let go of?

5 The Culture You Would Create

When growth becomes a larger part of your firm's DNA, what does it feel like for your team — pressured, purposeful, or natural? How do you want to shape that experience?

Notes:

6 The Enterprise You Would Own

If your combined Marketing Approach™ and Organic Growth Readiness™ scores moved from where they are today to the top quartile in three years, what would that mean for your enterprise value, your succession options, and your personal financial outcome?

7 The Story You Would Tell

Three years from now, what do you want your clients, team members, and COI partners to say about how you led growth at this firm? What story should your results tell about your leadership and your vision?

8 The Risk of Not Acting

What happens to this firm — to its clients, its team, its competitive position, and its enterprise value — if you leave this session and execute at the same level you have been? What is the cost of the status quo?

Team Reflection — What Shifts Are We Committing To?

Complete the From-To table below as a leadership team. For each dimension, describe where the firm is today and where it will be if this plan is executed. This is the narrative you return to when the work gets hard.

Dimension	From (Today)	To (12 Months)
Growth Source		
Marketing Discipline		
Referral System		
Client Advocacy		
Team & Capacity		
Leadership Model		

4

In Conclusion: The Leadership Commitment

(Before anyone leaves this room)

Planning without commitment is just theater. Before this session ends, every leader in the room signs off on their specific objectives, key results, and workstream ownership. The 30-day check-in date is set now — not discussed later. The purpose of the next page is not administrative. It is a covenant between the leadership team and the aligned, future vision of growth they have chosen.

“ The real measure of leadership is not how much a firm grows, but how intentionally and sustainably that growth is achieved.”

– Ray Sclafani

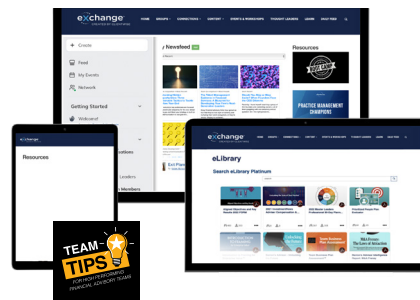
The Leadership Commitment

Leader / Team Member	Primary Objective Owned	Workstream(s) Leading	30-Day Commitment	Signature
30-Day Check-In Date:			Next Annual Planning Reset:	



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About ClientWise

ClientWise is the premier business and executive coaching firm working exclusively with financial professionals. Through the growth of individuals at all production levels, our mission is to develop leaders who raise the industry standards of professionalism, service, commitment and integrity. Financial professionals become resourceful problem solvers, more adept practice managers, and better business owners through the ClientWise coaching process. In turn, they bring these sustainable skills to benefit their clients, their businesses, their institutions, and ultimately the industry overall.

As members of the International Coaching Federation (ICF), our coaches adhere to a strict code of ethics and are provided with unique experiences that allow them access to the challenges and opportunities faced by financial professionals on a daily basis. Each coaching program is distinctively tailored to match the professionals' objectives, through services ranging from individual and team coaching, workshop facilitation, team facilitation, and coaching skills training.

This coaching process is coupled with our original ClientWise practice management content, which is developed from in-depth research by industry experts in both coaching and financial services. These proprietary tools and databases, including The ClientWise Benchmark Assessment Report™ and The ClientWise Coach Insights Database™, contain best practices from leading professionals and access to the most significant financial trends and influences worldwide.

Our ability to provide sound industry knowledge through the powerful lens of a coaching partnership is unmatched, and this combination solidifies the ClientWise advantage.

Our Philosophy

The Coaching Partnership

The coaching relationship, unlike that of consulting or advising, is a partnership formed between the financial professional and the coach. The relationship between the two evolves as the professional's business evolves, and as the financial services industry in which it resides evolves. Throughout this partnership, financial professionals work through their initial goals so that they can later attain successively larger goals independently, having achieved the intellectual and emotional mechanisms to self-coach and self-guide through their coaching program.

While each coaching program is defined by a specific timeframe, the relationship between coach and professional, and the tools and to take advantage of the lasting relationship with their coaches by continuing to model the journey learning initiated by their partnership.

Notes:

As our overarching mission is to generate consistent industry improvement through the growth of individual professionals, we continually tap into our resources to generate the best practice management tools and content with which to fuel that improvement. When the financial services industry shifts and changes the environment, we have clarity around how to evolve with it. Our proprietary content and coaching tune up programs allow financial professionals the ability to evolve alongside ClientWise throughout the life of their businesses, providing even more opportunities for success moving forward.

The Axis of Coaching & Content

Content alone, delivered en masse, will not help financial professionals achieve the level of success they desire. Nor will content alone increase the productivity of a given firm or the financial services industry on the whole. Proof of this lies in a marketplace laden with content that is accessible to all financial professionals, the majority of whom continually fall short of their goals. Instead, it is the unique axis at which great content meets a powerful coaching partnership that success is achieved. And it is from here that our founder, Ray Sclafani, launched ClientWise. Ray's understanding of advisor behavior, especially as related to the acquisition programs he created at Alliance Bernstein, motivated him to launch ClientWise in 2006, and develop the distinctive relationship between coaching and content that is now a ClientWise signature.

Our clients' success stories continue to prove that strong content supported by our scalable ClientWise coaching programs achieves far better and more sustainable business results than content alone.

Get Started

Learn more about The ClientWise Coaching Partnership and begin to create sustainable business results.

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- ▶ Curriculum Design and Program Development
- ▶ Presentation Delivery and Workshop Facilitation
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