# The 2027 Growth Planning Check

A quick executive assessment for determining whether your leadership team is aligned enough to enter 2027 with focus.

Planning season is the time to make decisions, not simply compile departmental activity. Use this check to assess whether your leadership team has the clarity and alignment needed to enter next year with a plan everyone actually agrees on.

**For each question, select one response:** **Yes** — We are aligned and can articulate this clearly. · **Partly** — Important gaps or conflicting views remain. · **No** — We do not have sufficient clarity or alignment today.

**1. Do we agree on the single growth constraint most likely to limit our growth in 2027?** ☐ Yes ☐ Partly ☐ No

*Consider:* Are we constrained by market focus, demand creation, sales conversion, customer retention, product readiness, operating capacity, or something else? This should be the single primary issue, not a list of everything that could improve.

**2. Are we aligned on the customers and opportunities we will prioritize for 2027, and what we will deprioritize?** ☐ Yes ☐ Partly ☐ No

*Consider:* Can the leadership team clearly name the customers, segments, offers, and opportunities that deserve attention next year, and those that don't?

**3. Do our leaders share the same story about how we will create, win, retain, and grow revenue in 2027?** ☐ Yes ☐ Partly ☐ No

*Consider:* Do Sales, Marketing, Product, Customer Success, and Finance operate from the same assumptions about where next year's revenue will come from and what has to happen, in what order, to get there?

**4. Can each functional leader name their specific contribution to the company's top two or three growth priorities for the year?** ☐ Yes ☐ Partly ☐ No

*Consider:* Is it clear what each leader owns, where the handoffs happen, and how the team will work together across the year?

**5. Do we have a practical plan for the first 90 days of 2027, with clear owners, decisions, and measures of progress?** ☐ Yes ☐ Partly ☐ No

*Consider:* Have we defined the few decisions that need to be made early, the initiatives to move first, the accountable owners, and the measures that will tell us whether the year is actually on track?

## Interpreting Your Results

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| **4–5 "Yes"** | Your team has a strong foundation heading into 2027. Focus on execution discipline and maintaining alignment as the year unfolds. |
| **2–3 "Yes"** | Your direction is emerging, but important gaps could create fragmented execution. Use a focused planning process to resolve the highest-impact decisions before the year begins. |
| **0–1 "Yes"** | The business is at risk of entering 2027 with competing priorities and unclear ownership. Align the leadership team on the growth constraint, strategic choices, and 90-day roadmap before committing next year's resources. |

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Ready to talk through your results? Book a strategy call — aphillipsadvisory.com/schedule