

CPA Firm Action Kit: Activate Strategic Advisory with Growth-Drive

1. **Certify Your Team**

Enroll select team members in the **C3D Certification** to build foundational skills in the 3 *Dimensions of Business Growth*: Profitability, Strategic Capacity, and Transferable Value. This equips your firm to lead growth conversations with clients [\[2\]](#).

2. **Deploy CLARITY Software**

Use Growth-Drive's **CLARITY software** to assess client businesses, identify bottlenecks, and build strategic improvement plans. CLARITY supports execution tracking and demonstrates progress toward increased business value [\[2\]](#).

3. **Package & Launch Advisory Services**

Develop service bundles that combine C3D insights, CLARITY analytics, and your existing tax/assurance knowledge to offer year-round advisory relationships.

4. **Utilize Sophisticated Coaching**

Leverage Growth-Drive's coaching community for implementation support, client strategy reviews, and practice growth mentoring [\[2\]](#).

5. **Measure Client Success**

Track increases in client profit, capacity, and value—using these metrics as proof of performance and a basis for higher-value retainers.

6. **Scale Firm-Wide**

Once initial advisors are delivering wins, expand certification firm-wide and integrate Growth-Drive into partner KPIs and firm growth strategy.