Advisor Advantage Company Growth Matrix - Product	Emerging	Growing	Expanding	Leading
The Team	The people who lead the Team are the technical leaders who prioritze fit & function over budget and schedule.

The team members are typically a collective of technical talent with the ability to cover most functional areas.

Borrowing from engineering is the norm. | Key team members demonstrate individual knowledge resulting in formation of knowledge-teams for functional areas.

There is a tendency toward creation of matrixed organization sharing resources across clients.

Domain or technical talent drives pecking order within the team. | Executive management voices are driving formalization of the organization while having difficulty making transformation decisions from business and technical domain teams to a client orientation.

Formal roles, responsibilities, and a career path are needed to retain and attact the best technical and business domain experts for the Team of the Time.

Organizational challenges for who leads the new Team are evident as professional management is now a must. | The people who lead the organization are seen as domain experts with client orientation. The culture is quality and client results oriented.

The services leaders are seen as client sucesss advocates driving best-in-industry practices while still seeking every opportunity to grow the account for the firm.

The development leaders are focused on providing the right solution. Being customer focused yet balancing technical longevtivity.

All team members participate in product, sales, and financial discussions with acceptance across the table from their peers. |
| **Metrics That Matter** | Revenue, expense, and profit margin are unknown or if known, are questionable when analyzed.

The objective is get the project-done at any/all costs - live customers is the goal.

High utilization of the team is expected and not measured. Attrition is likely low and not seen as a risk. | Revenue, expense, and profit margin are visible and explained in regular financial meetings. Subsidizing of services via license revenue line is leveraged into Services performance measurements and rewards at least in concept.

Shortfalls on revenue and margin or higher expense results are rationalized while billable utilization numbers appear high at a macro level.

Attrition is rising and is becoming a concern at 10% to 15% with ramp-up of new hires a detractor to booked project work an/or product development goals. Attrition has an impact. | Revenue, expense, and profit margin are forecast and measured monthly with achievement ranging from (-15% to +15%).

Services culture embraces cost containment when revenue or profit is threatened and is vocal with the Team about the Numbers on a monthly basis.

The Team understands how they achieve via utilization and notify Team leaders' when their demand is low.

Attrition is slightly below industry average (10% - 15%) and growth demands attract high caliber candidates. | Revenue, expense, and profit targets are supported by world-class utilization rates, low non-bill utilization, and above industry services rates.

Team leaders see their individual P&L as a business and themselves as the executive-in-charge for their clients.

Attrition rates maintain between 8% and 10% annually. |
| **Sales Enablement** | Sales is the hunter of the needed anchor accounts while the embryonic service team is too busy to be involved.

Development is interrupt driven by Sales need.

Services projects aren't seen as money-makers but as a necessary step in meeting the contract commitment. | Service and Development team leaders are regular participants in scoping and proposal preparation but don't have a voice in estimating or pricing.

Transition from sales to services is beginning to form while the sales executive's experience or sales management culture is more dominant in the final estimating / pricing. | Services fully participate in the scoping, estimating, pricing, and sign-off for deals with the sales management team.

New deal sign-off is symbolic with ability to override when/if C-suite executives agree. Services leaders have quarterly/annual sales targets for at least 10% of their annual target.

Development is isolated from pricing decisions and embraced in the estimating process. | The Team participation in the sales process is expected and welcomed resulting in high-leverage operational ROI scenarios driving higher product / services value to the firm.

Organic sales occur as a result of on-going advocation for the client's business operation by the Team. |
| **The Processes & Technologies** | Process is driven by a few and uses the follow-me philosophy to build understanding of the approach to build, install, implement and service a product. Open discussion is the most used design pattern. Requirements and understanding vary by hour.

Service is everyone's task but accountability is fragmented among key team members. Service is often driven by non-billable work to refine / correct the solution to meet client expectation, as a post-project concern resulting from sales learning of lower than expected customer satisfaction. | Development is moving from reactionary to planned projects. Search for formal development methodlgies to deliver software faster raises the risk of too-much-process too early.

Key team members have built functional checklists to outline processes with major milestones and include client involvement. Technology team members have built "install utilities with technology" that move from project-to-project but lack documentation on usage, known as the consultant-toolkit.

Early project management capabilities are emerging as another matrixed skillset.

Budding best-practices has begun in the business and technical domains. | Dominant and vocal business / technical leaders formalize and annually revise a delivery methodology stating best-practices for the business.

Compentency teams shape consistent use, documentation, and deployment of project utilies while leveraging their voice into product management.

A common project management philosophy & tool is deployed with the delivery methdology.

Formal development methodologies are in place but teams are struggling with adoption as there is always something new around the next corner.

Industry standards such as CMMI are being looked to for adoption to add credibility to the organization.

Executive management has imple- | Processes are known, repeatable, learnable, and leverage technology to advance team use of information in status and decision making. Knowing what to do, why to do it, how it was done, what the status is, and what was achieved is an expectation of the Team; by the Team.

Best-practices and innovation drive product development and services to habitually revisit methods, processes, and technologies to deliver a greater result in each new release and customer implementation.

Reputational hiring as a attracts best-in-industry personnel to bolster growth plans aligned with culture and growth plans. |