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AN INSIGHT REPORT FROM PROMETIS PARTNERS

The Strategic Planning Gap

What 600+ Business Risk Profiles Reveal About Growth in the Mid-Market

600+ TRANSITION360 RISK PROFILES • NATIONWIDE BENCHMARK DATA

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Prometis Partners helps owners turn growth into enterprise value, and build companies that are stronger, clearer, and easier to lead.

43%

AVERAGE STRATEGIC PLANNING SCORE ACROSS 600+ TRANSITION360 RISK PROFILES PERFORMED NATIONWIDE

Most owners think they have a strategic plan. What they often have is a budget, a set of goals, or a few priorities still living in their head. The data says that gap is wider than most leaders realize.

After more than 600 Transition360 Risk Profiles performed for privately held businesses across the country, one pattern stands out: the average company scores just 43% on strategic planning maturity. If this were graded like anything else, it would not pass, and the cost is not a dusty binder on a shelf. It is missed growth, unclear priorities, leadership drift, and value left on the table.

WHAT A 43% SCORE ACTUALLY COSTS BUSINESS

Growth & Sustainability: Companies that review their strategic plan quarterly are up to 12x more likely to hit their stated goals than those that review it once a year (Bain & Company). A plan no one revisits cannot steer growth; it can only describe last year's guess.

Culture: Companies with intentional culture management outperform their industry peers by 3x on revenue and profit (Deloitte). Culture does not align to a plan the team has never seen.

Financial Performance: Leadership communication failures account for 57% of project failures in organizations with more than 10 employees (PMI). Every one of those failures is money spent without a return, whether or not it is ever traced back to a line item.

Transition & Exit: Only 35% of privately held businesses have a senior management team capable of running without the owner (Exit Planning Institute), and management succession gaps are the number one reason business transactions fail after a letter of intent (BizBuySell).

None of this shows up on this year's P&L or balance sheet. It shows up later, and by then, it is far more expensive to fix.

This report shows where the strategic planning gap usually appears, why it quietly slows growth, and what stronger companies do differently before the cost becomes obvious.

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Four Gaps We See in Nearly Every Assessment

Before reading the four gaps, ask yourself one question: if your leadership team had to make the next major growth decision without you in the room, would they use the same strategy you would?

Across a sample of more than 600 companies, the same four gaps surface again and again, regardless of industry, region, or revenue size.

01 A Budget, Not a Plan

Most of these businesses are not planless. They are using next year's budget as their strategy. A budget shows what the company expects to spend. It does not define where the business is going, why that path matters, or what must be true to get there. When the budget becomes the plan, the business is steering by last year's assumptions.

02 A Mature Market, No Way to Take More of It

Most of these businesses already operate in proven markets. That is not the problem. The gap is penetration: they do not have a clear, funded plan to win more share in a market they already understand. Being in a good market is not the same as having a strategy to win more of it.

03 An Undefined Competitive Position

Ask most owners who their real competition is, and the answer is often a guess dressed up as analysis. Few can name the substitutes pulling at their customers, explain why buyers choose them instead, or define what still makes the company different after a competitor copies the latest improvement. Without a clear position, the business reacts instead of leads.

04 No Plan for What Comes Next

Product and market development, the deliberate evolution of what the company sells and who it serves, is the gap most often left blank. Owners can usually describe today's revenue mix in detail. Far fewer can explain what the business should sell next, which customers it should pursue, and how those choices connect to a stronger growth path over the next 12 to 24 months.

These patterns track with the broader research: 67–90% of strategic plans fail at the execution stage rather than the design stage (Kaplan & Norton; Harvard Business Review), and the majority of leadership teams spend less than one hour a month actually discussing strategy execution (MIT Sloan).

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What the Top Quartile Does Differently

The companies closing the gap are not more complicated. They are more disciplined. They make strategy visible, review it on a rhythm, fund the few priorities that matter, and hold leaders accountable for progress before the year gets away from them.

- They treat the plan as a decision filter, not a document, reviewed quarterly, not once a year and forgotten.
- They can name their real competition and can say precisely why a customer chooses them instead.
- They have a defined, funded plan to take more share inside the market they're already in, not just a presence in it.
- Every priority has a named owner, a deadline, and a review date. "The team owns it" means no one does.
- The plan is written so the business can run without the owner in the room, because eventually, it will have to.

That last point matters because a strategic planning gap is not only a growth problem. It is a value problem. Strong companies can explain where they are going, why the path matters, who owns the priorities, and how progress gets reviewed. Without that discipline, even a good business can look harder to scale, harder to lead, and harder to value.

Find Out Where Your Business Stands

You do not need a perfect plan to make better decisions. You need a clearer view of the gaps slowing growth, stretching your team, and limiting the value of the business. The Transition360 Risk Profile takes just a few minutes and gives you a personalized snapshot of where your business stands, and where to focus first.

See Where Your Strategic Planning Gap Is →

Vincent Mastrovito, CEO, Prometis Partners
616-236-0749 • vincent@prometispartners.com • prometispartners.com

About Us

Vincent Mastrovito, Prometis Partners

Prometis Partners works as a wealth builder for owners of privately held, mid-market companies, helping them close the gaps that quietly limit growth and turn that growth into real enterprise value. The result is a business that is stronger, clearer, and easier to lead through its next stage, whether that means expansion, succession, or an eventual sale. The Transition360 Risk Profile behind this report is built from real assessments of real companies, not theory.



Vincent Mastrovito is the founder and president of Prometis Partners. He began his career in 1989 in wealth management, spending two decades with Lincoln Financial Group before building his own firm around his true passion: working closely with business owners as a wealth builder on exit planning strategy. Vincent is a Certified Exit Planning Advisor (CEPA®), Certified Business Exit Consultant (CBEC®), Certified Value Builder (CVB™), and Certified DISC+ Coach (CDVC®), and is the founding president of the Exit Planning Institute's West Michigan Chapter. A national speaker on exit planning, he also leads round-table discussions with owners to work through the issues they face selling or transferring their companies.

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