

FY26 Strategic Plan

Meridian Advisory Group · Approved by the Partner Group · 14 January 2026

Ambition

Our ambition is to be the advisory firm of choice for mid-market industrials in the Midwest. Growth will come from deepening relationships with our 60 largest clients.

We compete on the judgment of our partners and the trust we have built over nineteen years. Clients come to us when a decision is consequential and reversible only at great cost. That position is not in question. What is in question is whether the firm can grow without proportionally growing partner hours.

Financial targets

Revenue targets assume 12% growth with utilization held at 74%.

Revenue target	\$46.1M (FY26), from \$41.2M (FY25)
Utilization	74% held flat across all grades
Headcount	140 today, 152 planned by Q4
Margin target	36% average engagement gross margin
Recurring revenue	No target set for FY26

Growth priorities

- Deepen the top 60 accounts through senior relationship coverage.
- Expand the operations practice into supply chain resilience work.
- Improve proposal conversion through earlier partner involvement.
- Continue the productization initiative carried over from FY24 and FY25.

Execution and ownership

The plan does not name specific offers, price points or the operating changes required; each practice leader is asked to build their own pipeline plan by Q2.

Practice leaders retain full discretion over scope, staffing and pricing within their portfolios. The partner group will review progress at the quarterly business review. No central delivery standard, offer catalog revision or pricing policy change is contemplated in this plan.

Risks acknowledged

- Client concentration remains high and is not addressed in this plan.
- Senior capacity is the binding constraint on growth.
- The productization initiative has no named owner and no budgeted time.

Sample document — Meridian Advisory Group is an illustrative firm created for this demonstration. Nothing here refers to a real client.