



PLANNING DAY FOR BUSINESS

Overview

Our planning day is designed to enable you to take time out from your business, to work on your business. Our aim is to work with you in relation to your business planning requirements. We stress the fact that you establish your own business and personal goals.

We will educate, assist and guide you by using our skills and experience to enable you to establish clear strategies and actions, to guide you towards achieving your goals.

Content:

Prior to the planning day a nurture meeting is held to gain a good understanding of where you are at. This information is then used to prepare for the planning day.

The planning day is held with key personnel, usually the owners of the business and tailor made to suit. Some of the topics covered include:

- What do you want your business to do for you?
- Goals, Strategies and Actions (developing a 5 year plan)
- Analysis of status quo performance
- Analysis of debt position
- Statement of position
- Cashflow & Budget
- Variables
- Relevant issues - opportunities/strengths
- Relevant issues - Threats/weaknesses
- Time Management
- Reliance on key personnel
- Succession
- Complete sell down process
- Operation of your business
- A written report of the planning day, which we consider a "live document" whereby the client can develop and build upon.
- To do lists - clearly outlining who needs to do what and by when
- Accountability sessions (frequency depending on individual requirements)
- Action Plan

Client Benefit/Value:

- Delivery of your action plan
- Retention of staff
- Alignment of your budget with your new goals
- Demonstration of the most appropriate debt reduction plan
- Review of the business operations and development of strategies.



- Clear vision for the future
- Time working "on" the business

Duration (session/hours):

A free 90 minute nurture meeting prior to the Planning Day session.

Cost: We price our projects upfront once assessing your individual needs.

Our price is determined by a combination of our time involved and the quantity of intellectual property required to be used for the project.