



Strategic planning

Your roadmap to giving
you the life you want



THE PAIN

Have you ever felt...

- You're working too hard and too many hours, or
- Your business isn't growing fast enough, or
- You're not making enough money, or even
- Business isn't as fun as it used to be?

If so, don't worry. You're not alone.

Business is hard. And for the owner of a small business it can be lonely.

It's hard whether you're just starting out, or having an established business. Just consider these facts:

Starting out in business

According to research more than half of new businesses don't survive beyond 5 years. Here are some of the reasons for such high failure rates:

- An inability to build a profitable business model with proven revenue streams
- Failure to create and communicate value propositions in a clear, concise and compelling way
- No real differentiation in the market, which means competing on price
- Emotional pricing – a lack of understanding of pricing strategy; reacting to gut feel and emotion rather than the facts
- Not really in touch with customers and a lack of understanding of the market
- Lack of business and strategic planning
- Rapid expansion leading to 'over-trading' and running out of cash
- A lack of systems
- Poor sales and marketing processes

It doesn't get any easier after 5 years... just a new set of problems.

The established business

Businesses that have been established for 5 or more years have typically gone through an initial high growth phase, but then they start to stagnate. Some of the common problems we find include:

- Constant cash flow issues due to the demands of high overheads and working capital needs,
- Slow growth – or even declining sales,
- Downward pressure on price and margins,
- The business owner working too hard, and
- Consistently falling short of profit targets.

SO WHAT IS THE SOLUTION?

The answer is to revisit your strategy, your reason for being in business and what you want to achieve.

Our strategic planning days and programme will help you identify what you want to achieve and how to get there. We work with you to create a roadmap that gives you a clear picture of how to build the business you want.

This service is for ambitious business owners who want to get better results.

Some of the key areas that we may cover if they are important to you include:

- **How to set and achieve** your personal and business goals
- **How to identify and tackle** the major challenges facing your business
- **How to sell your products and services** for what they are really worth
- **How to win more customers** – and earn more money from them – than ever before

- **How to never lose another customer** ever again by making yours the most talked about customer service in your industry or area

So how much is your investment

We know that everyone is different. Your business is unique. So we provide you with a range of options so you can choose the package that best meets your needs.

For each of those packages we give you a fixed price so you can budget and plan. And each of those packages can be tailored so that you get exactly what you want.

In other words, you're in complete control and can build the strategic planning programme that best meets your needs and budget.

Will it work for you?

The answer is *yes*, and because we're so certain we have a special promise.

At the end of the strategic planning day if you are not completely delighted by the end of the day, we will refund every single penny of your investment... with no hassle and no questions asked. In other words, you have an *unconditional 100% money back guarantee*.

It works like this.

After the strategic planning day we send you a feedback form. On that feedback form we ask you to tell us how much the day was worth. And if that amount is less than your investment you tick a box to say you would like us to refund you the difference between your investment and what you thought it was worth (even if you tell us it was not worth anything).

That's how committed we are to this programme. And how committed we are to the success of your business.

YOUR OPTIONS AT A GLANCE

Whatever your business, you will find one of our strategic planning bundles to suit your needs. The table below summarises what is included within each of our strategic planning service levels. To help you identify the best option for you here is a quick overview:

Business re-engineering – This is the best option for ambitious business owners who want the most comprehensive level of help in achieving their business and personal goals. Here we go beyond the strategic planning and work closely with you to implement your strategy.

Profit growth – This is our most popular option because you get ongoing support beyond the initial strategic planning day. We work with you to create strategies for business growth and profit improvement.

Strategic planning – This option is best for those business owners who are on a tight budget or don't want to commit to a full programme or just want pointing in the right direction.

Your strategic planning options at a glance

	Business re-engineering	Profit growth	Strategic planning
Initial assessment – understanding your business	●	●	●
Possibility analysis	●	●	●
Strategic planning session	●	●	●
Prioritised strategic action plan	●	●	●
Accountability programme	●	●	○
Measuring the things that really matter	●	●	○
Business review meetings	●	●	○
Business mentoring programme	●	●	○
Profit improvement resource centre	●	●	○
Unlimited email and telephone support	●	●	○
Sales and marketing training programme	●	○	○
Effective pricing training programme	●	○	○
Systemisation training programme	●	○	○
Customer service team training workshop	●	○	○
Systemisation	●	○	○
Mystery shop and benchmark	●	○	○
Customer survey	●	○	○
Core values, core purpose and vision statement	●	○	○

● Included within the bundle
○ Not included within the bundle

Prices on request and specific to your individual requirements.

HOW YOU BENEFIT FROM OUR STRATEGIC PLANNING SESSION

There are 5 stages we take you through during our strategic planning meeting:

Stage 1

We carry out an initial assessment to get a better understanding of your business and a clear picture of where you are now. This includes the most important numbers in your business and what those numbers are now. This process will give you greater clarity on where you and your business are.

Stage 2

Using our skill with numbers we work together using '*what-if analysis*' to identify possibilities and your potential. At the end of this stage you will have a clear picture of how much profit your business should be making.

Stage 3

Working together we look at what is important to you, what you want to achieve both personally and in business and build your goals. This stage will give you clarity on where you want to be in your life and in business.

Stage 4

This detailed analysis explores your business challenges, how to overcome those hurdles and ways to get from where you are now to where you want to be. We use a number of tools and processes to help you map out your strategies for getting to where you want to be.

Stage 5

We create a Prioritised Strategic Action Plan giving you a roadmap for the way forward.

At the end of our session together you will have a clear picture of what needs doing, how to do it and when to do it so you can achieve the results you want from your life and from your business.

Of course, this is just a starting point. Next you have to then put the plan into action.

Many of our clients choose to involve us in helping them to implement that plan and this is the purpose of our profit growth programme.

As part of our **profit growth** programme you will benefit from the following:

Accountability programme

One of the keys to success is taking action. You need to do the things necessary to move you towards your goals. Unfortunately this is harder than it sounds. The day-to-day running of a business often gets in the way.

Having an external person holding you accountable helps you to get the right things done. We will schedule a monthly call with you to help you work through your strategic action plan and provide help and support. This external support will make it much more likely you achieve your personal and business goals.

Measuring the things that really matter

Numbers are really important. Not all numbers, but the right numbers are. Perhaps you've heard the phrase '*what gets measured gets done*'. We help you to identify the really important numbers and how to measure them.

Measuring these numbers on a regular basis helps keep you focused on moving towards your goal and increases the chances of you being successful.

Business review meeting

One of the things that all of the most successful companies have in common is they hold regular board meetings to discuss strategy. What's more, in our experience, when businesses – even sole traders – start holding board meetings they immediately start thinking like, acting like and achieving like their bigger and more successful counterparts.

In this meeting we will review your strategic action plan, review the numbers that really matter and help you with your strategy.

You can choose whether you would like this meeting support weekly, monthly or quarterly.

Business mentoring programme

We run a monthly mentoring programme for forward-thinking business owners. These meetings take place online, which means you don't need to travel, you simply log into the meeting from your computer. Each meeting lasts just 90 minutes, which means you get support every month on key business issues in bite size chunks.

And because you are part of a group you can benefit not only from our support, experience and guidance but also tap into the power of the group. This is great for networking, tapping into other group members' contacts and learning from other business owners just like you.

Profit improvement resource centre

With our profit growth programme you get access to our online video training library and resource centre. This business resource centre contains videos and other resources to help you with your strategy, pricing, marketing and much more. You get resources to help you build a more profitable and successful business.

Unlimited email and telephone support

Your fixed price is fully inclusive of unlimited email and telephone support for advice on ad-hoc matters.

This means that you can call on us at any time knowing that you will never be charged for our time or advice. So I hope you will feel free to speak to us whenever you need to, without ever having to worry about the cost.

Of course, if the issues raised at any of these unlimited free consultations (or anywhere else) require research or analysis *beyond* the consultation, we will give you a fixed price quotation for that extra work *before* any additional work is started. This means you will *never* get an unexpected bill.



As part of our **business re-engineering** programme you will benefit from the following:

Our business re-engineering programme goes beyond the strategic planning. We work closely with you – often on a weekly basis – to implement your strategy. This is a structured 12-month programme that includes everything above plus all of the following:

Training programmes

We run a number of training programmes with you and your team to help you build a better business. These programmes include the following:

- **Sales and marketing** – how to generate sales leads and convert them into paying customers
- **Effective pricing** – how to price more profitably
- **Systemising your business** – how to systemise your business so it works better and without you having to be there
- **Customer service** – a workshop for your entire team on how to keep customers for longer

Systemisation

As Michael Gerber says, *“Most businesses don’t work, it’s the people who own them do.”* This is down to a lack of systems. It’s why most business owners work too hard and have too few holidays... they need to be there every day to ensure the business is working.

The solution is systems.

We show you how to create systems for your business, how to prioritise which systems to create first and then work with you to help you every step of the way throughout this re-engineering programme.

Customer service

When you give great service you keep customers for longer, they buy more from you (and at higher prices) and they tell other people how great you are. But how do you know how good your service is? There are three things we do for you:

- **Mystery shopping** – our mystery shop exercise identifies potential problems in your customer service systems
- **Customer service benchmark** – we compare your service levels with your competitors and show you how you can be better than them
- **Customer survey** – we carry out an independent survey of your customers to discover what they think and how we can improve what you do

Core value, core purpose and vision statement

During the strategic planning day we’ll look at the importance of core values, core purpose (‘your reason why’) and your vision statement. During this re-engineering programme we will help you to finalise these three critical components of strategy and how to communicate them with your: team so that everyone is ‘on board’ and pulling in the same direction; and then with your customers so they see you as being different and better.

POPULAR ADD-ONS

Here are some of the related services that are most popular:

Cloud Accounting Set Up: Installing a cloud accounting system

A cloud accounting system will make your life so much easier. Here are some of the benefits:

- **It saves you** a very significant amount of time,
- **Gives you 24/7 access to up-to-date** financial information and reports (you can use cloud-based software from any device with an internet connection),
- **You can sleep at night** knowing your sensitive financial data is always secure and backed-up automatically,
- **No system downtime** because all software upgrades are automatically installed. This

worry-free maintenance saves you time and hassle,

- **It reduces your accountancy fees** because it makes it easier for your accountant to produce end of year accounts, and
- **Since your accountant can access your data 24/7** you get more value from an accountant – they will help you run and grow your business rather than just adding up the numbers.

We will set up your cloud accounting system, provide full advice and training.

Cloud Reporting: Monthly or quarterly reporting, cash flow forecasting and budgeting

Management reports, forecasting and budgeting help you plan and will give you an early-warning signal if you are likely to face cash shortages. Our management reporting service is broken down into three packages so you can choose the one that works best for you. This service will give you a continually up-to-date complete picture of what your business might look like in the future. In fact, this is such a powerful business planning tool banks very often insist on it as part of raising finance.



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