

Strategic Business Planning



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Research suggests that a surprisingly large proportion of businesses have no formal business plan. In our experience, our more successful clients are those who spend time and effort creating and then implementing their plans. It's normally an ongoing process, updated as market conditions change and the business develops.

Getting started

It's common to hear phrases like "work smarter, not harder" or "work on the business not just in it", but living up to these principles is easier said than done. Just because it's common sense, doesn't mean it's common practice.

It can be difficult to know where to begin. Consultants can be valuable in helping to identify the strengths and weaknesses of your business, and the opportunities and threats in the wider market. These are critical factors to consider when putting together a business plan. But a plan created in this way is almost always doomed to be consigned to the bottom of your desk drawer, because it's not *your* plan.

At Shipleys, we've got plenty of experience of helping our clients with business plans, often as part of a new business venture, fund-raising exercise or grooming to maximise value in anticipation of an exit or sale. But in view of current economic conditions, we're taking a much more pro-active role to help our clients through a potentially challenging period.

A different approach

Our approach is a bit different to that of a typical consultant. It's based on the fact that nobody knows the ins and outs of your business like you do. We help by combining *your* expertise and knowledge with a proven process.

We facilitate the planning process, so you get *your* plan for *your* business. Our experience and specialist planning tools make sure you cover all the bases. And because your plan will be of little real value unless it's implemented effectively, we'll help you prioritise and produce an action plan with clear timescales and responsibilities. We can also assist with the monitoring and review process.

'Flash review'

For clients who want a taster of the potential benefits before taking the plunge, we offer a two-hour 'flash review' session to introduce the planning process, and to help establish the needs and wants of the business owners.

Full strategic planning review

A full strategic planning review will normally involve the owners, and possibly other senior members of the management team, spending a full day with us. Away from the everyday distractions and interruptions of business, it allows you to focus on and identify what's important to the business and to you personally. Prioritised goals and projected future outcomes are recorded.

The strategic planning review takes you through a structured process. Remember, it's not about us giving you a report but about helping clarify what's important to you and to produce an action plan. Our role is facilitation.

Strategic Business Planning

Plan modules

The strategic planning review is divided into modules, so depending on the needs of your business, we can help you with any or all of the following.

- Clarifying where you are now
- Understanding your goals as an organisation
- Sales and marketing action plans
- Strategic financial models
- Structuring time more efficiently
- Leadership
- Assessing use of resources
- Identifying cost saving opportunities
- Planning for effective investment
- Targeting key performance indicators

Your plan for your business

The end product is *your plan for your business*. It's a bespoke multi-year blueprint, presented as a substantial high-quality document, complete with action points and review processes to help keep you on track.

Review and follow-up

To maintain your focus and momentum we offer follow-up sessions to review progress and to examine any areas of concern or interest.

Shipleys' strategic business planning team

For more information on a 'flash review' or full strategic planning review for your business, please speak to your usual Shipleys contact, or to: Steve Foster

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Specific advice should be obtained before taking action, or refraining from taking action, on any of the subjects covered above.

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