



## Business Planning Session - Outline

### Why we developed this service?

Success is about planning and we want to help you achieve success.

- Do you have a current business plan?
- Have you set realistic and measurable goals?
- Do you have clear strategies to achieve your goals?
- Do you regularly review your goals in regard to changing circumstances?

This session will require you to take time out from day to day activities **in** the business to focus **on** the business. Together we will review past performance and clarify future direction. You will set solid and realistic business goals and define strategies for achievement. At the end of the session you will have a one page business plan which will act as a guide map to ensure you are on course for success.

### Who should have a session?

If you do not have an existing business plan, that you are working from and regularly reviewing then this session is provided for you.

### What is involved?

You will participate in a two to three hour planning session which will be facilitated by Quay Accountants.

The key issues covered will be:

- Goal setting for the business
- Discussing and agreeing on an action plan to address critical issues faced by the business in the next 12 months
- Identification of 5 Quick Wins (actions that can be completed within a month)
- Identification of 5 Key Projects (actions that are completed over 3 to 6 months)
- Discussing and agreeing on goals both personal and business goals for the next 12 months and how these can be achieved

We will provide you with "Homework", that will need to be completed prior to the Planning Session to ensure you identify any issues that need to be discussed and so we can prepare any information required prior to the session.

### When should I have a session?

Anytime is a good time to make a business plan when none is in existence, however it is particularly relevant at the start of a new financial year. If you are contemplating a major change in an existing business or entering a new business venture, a business plan is crucial. You also will be required to have a business plan to support any financial applications.

***Call us now on 07 308 4414 (Whakatane) or 07 578 6069 (Tauranga) to discuss preparation of your Business Plan.***



## Benefits of a Business Planning Session

- Gives you a chance to review and set the direction of the business
- The facilitated session eliminates procrastination
- Helps you to find common goals amongst a number of owners(if applicable)
- Identifies your key goals
- Prioritises your goals
- Creates strategies for you to achieve your goals
- Identifies what you will need to achieve goals. This could be a combination of marketing, training, performance management, increased staffing and cost cutting
- Develop timeframes for achieving goals and therefore provides accountability
- Provides a tool to communicate your business goals and vision with your team
- Divides your goals into short term and long term - Quick Wins vs. Key Projects
- Provides you with a template to review actual performance against targets
- Provides you with a platform to develop Financial Forecasts
- Can be used as a basis for you to set team members' individual goals/targets