



# Planning Your Business for Results: The Easy Way

## \*\*\*Free Planning for Results Guide\*\*\*

- ✓ 7 easy steps to plan your business for real results
- ✓ How to complete important tasks quickly
- ✓ How to make critical decisions
- ✓ How to focus your effort
- ✓ How to follow through on projects
- ✓ How to achieve the results you truly want

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# What are you trying to Accomplish?

**Distinct Starting Point**

**Clear Vision**

**Robust Plan**

**Step by Step Course**

**Focused Action**

**Readjustment**

**Results**

# Planning Your Business for Results the Easy Way

## Step 1: Ensure you know where you are now

What is your current:

- product/service offering?
- market & competitors?
- marketing & sales methods?
- customer base?
- way of working (operations)?
- financial situation?

**Hint:** SWOT analysis is a straightforward but effective tool. Incorporate your analysis into your planning.

**Action:** **Conduct an audit of your current situation.**  
**Analyse strengths, weaknesses, opportunities and threats.**  
**Identify key issues.**

## Step 2: How do you see your business, now and in the future?

### **Vision: Looks to the future, (often internal)**

Amazon: *Our vision is to be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online.*

- What products/services will you offer and where?
- Who will be your customers?
- What do you want to be known for?

### **Values: Beliefs that guide the management of the business**

Microsoft: *As a company, and as individuals, we value integrity, honesty, openness, personal excellence, constructive self-criticism, continual self-improvement, and mutual respect ...*

- How will your beliefs make this happen?

### **Purpose: Why does the business exist? (External)**

Google's mission is to organize the world's information and make it universally accessible and useful.

Cave Sustainable Architects: *Our mission is to create beautiful spaces for people and planet through sustainable design.*

- What unique product/service are you offering?
- Why will customers buy from you?
- What key customer desire will you satisfy?

**Hint:** Refer to your audit, SWOT analysis and key issues.

**Action:** **Answer the above questions.  
Create/review the vision, values and purpose statements for your business.**

## Step 3: What do you want to achieve?

### Goal

Statement of what the business or owner intends to achieve – business, personal e.g. five years from now ...

*A goal is a dream with a deadline. Napoleon Hill*

*e.g. prepare the company for sale at a value of £10m within 5 years*

### Objective

A specific, measureable, achievable, realistic result to be attained within a time frame - *S.M.A.R.T*

Examples:

*Launch a new subscription service by 31 Dec to generate £100,000 p.a.*

*Achieve utilisation of 85% by 31 Mar*

*Increase and maintain gross margin at 40% from 1 Sep*

### Goals

- What do you want to achieve from the business?
- How do you see yourself in the future?
- What will you gain?

### Objectives

- What specific, measureable marketing & sales, operations and financial targets will you achieve?
- By when?

**Hint:** Refer to your audit, SWOT analysis key issues and Vision, Values & Purpose. Don't forget to consider your own personal goals.

**Action:** **Answer the above questions.**  
**Write down your goals and objectives.**

## Step 4: How do you get there?

### Strategies - How do you decide which to pursue?

#### Focus on your customers

- Who are they?
- What do they want?
- How do they buy?
- How will you sell?

#### Focus on your sector

- What strategies are your competitors pursuing?
- What trends is your sector facing?

#### Focus on your business

- What is working well and not so well within your business?
- What is critical to your business?

#### Examples:

*Concentrate on quality and exclusivity of product (not quantity) and price accordingly*

*Seek access to “movers & shakers” at highest level in the industry*

*Collaborate with partners & experts in key market areas*

*Package services into high value “products”*

*Use technology to challenge competitors*

#### Strategies

- How will you manage the business for improvement?
- How will you develop market opportunities?
- How will you solve issues within the business?

**Hint:** Refer to your audit, SWOT analysis key issues, Vision, Values & Purpose, Goals and Objectives.

**Action:** Answer the above questions.  
Identify 3-5 key strategies for your business.

## Step 5: What action will you take?

### Action Plans

- Actions & desired outcomes
- Prioritise
- Identify key milestones
- Set deadlines & responsibilities
- Determine monitoring & measures of success
- Focus on next 30-90 days

Determine what you need to do, by when, to achieve your objectives and be clear about how this will contribute to your success.

The implementation of the action plan should be meaningful enough to significantly contribute to the success of your business.

Example:

**Action Plan:** Communicate latest campaign to database via direct mail & telemarketing  
(to contribute to Objective – increase sales from £X to £Y by Dec)

**Milestones:** Prepare database; Produce direct mail; Organise telemarketing ...

**Deadline:** Database to be contacted by end of Sep

**Responsibility:** Business Owner

**Measurement:** number of appointments, value of sales won

**Summary:** Complete campaign via direct mail / telemarketing by 30 Sep

**Hint:** Refer to your audit, SWOT analysis key issues, Vision, Values & Purpose, Goals, Objectives & Strategies.

**Action:** Identify 3-5 key action plans for your business to contribute to your key objectives.

## Step 6: How well will you do?

### Financial Forecasts

- Profit and Loss – What will you forecast for sales, costs & profitability?
- Cash flow – What will your forecast cash flow be – money in, money out?
- Balance Sheet – What is the wealth of your business?

### Measures of Performance

e.g. Customers, Operations, People, New Products .....

Measure;

- How effectively you are managing the business – relate to business goals & objectives
- How well you provide your products / services
- How well you operate the business

e.g.

Customer satisfaction, feedback, reviews, testimonials

Repeat orders

Staff performance, feedback

Industry benchmarks

**Hint:** Refer to your audit, SWOT analysis key issues, Vision, Values & Purpose, Goals, Objectives, Strategies and Actions.

**Action:** Complete / update financial forecasts and identify 3-5 key measures of performance relevant for your business.



## Step 7: What have you accomplished?

**Measure** your results.

**Monitor** your success.

**Review** your plan in the light of your results and level of success.

**Hint:** Refer to your audit, SWOT analysis key issues, Vision, Values & Purpose, Goals, Objectives, Strategies and Actions.

**Action:** Update your plan.  
Measure, monitor and review.  
Return to Step 1.

For further help on planning your business visit my website [www.marketingaccomplish.co.uk](http://www.marketingaccomplish.co.uk).

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Christine has been in business for over 20 years as an analyst, consultant, project manager, quality manager, marketer, salesperson, trainer and business adviser and now runs her own flourishing marketing advisory service.

She has accomplished many things; made an appreciable difference to the sales and profitability of small businesses, provided practical, hands-on support and re-kindled passion and inspiration in business owners for their business success. She has worked hands-on in small businesses in a sales and marketing capacity and has passed on her business development knowledge and skills through training and advice.

For the past fifteen years she has worked with owners of small businesses in the service and professional sectors to make their business more profitable and successful. Business owners know they need to market their businesses effectively, but few are able to accomplish this without help to make it happen in a systematic and successful way.

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