

BUSINESS PLANNING...Providing a blueprint for your company and a roadmap for your growth

Business Planning is a process and discipline that will become an integral part of the way you do business and lead your company. Thinking strategically about your business will naturally become integrated with your planning efforts. Business planning will help you gain focus and clear direction. You will be positioned to react more quickly to challenges and capitalize on opportunities because you will know what you want to do. You will make better decisions because you will know what you want to become.

Tailored to address your immediate business concerns, the particular elements of your overall plan that need more focus, or to update your current plans, you direct your business planning process.

Business Planning Services

A formal Business Plan document may be needed by your company to use internally to provide direction to your management and employees, or to use externally to present to potential lenders and investors when seeking more capital for your business. Whether or not you choose to create a formal document, high-performing companies will always have a business planning process and discipline as an integral part of the way the business is managed.

Tap into the **Business Planning Services** offered by KAMDEN Strategy Group to help you complete a business plan, and more importantly to bring a business planning process and discipline into your company.

- ✓ Business Plan Documents
- ✓ Feasibility Studies
- ✓ Sensitivity Modeling
- ✓ Pro forma Financial Statements
- ✓ Sources and Uses of Cash
- ✓ Business Management Processes
- ✓ Performance Monitoring and Measurement Tools
 - Scorecards
 - Dashboards
 - Budgets
 - Forecasts
- ✓ Sales Plans
- ✓ Operating Plans
- ✓ Compensation and Incentive Plans

Need more? Not quite sure where you are ultimately heading? Need more long-range thinking before you will be ready to create plans for today?

Refine your long-term vision for your company. Know where you stand among your peers, and more importantly how you stand out in the eyes of your customers. Create high-level marketing, financial and other key strategies. Our **Business Strategy Services** bring professional resources to guide you through this process. Consulting roles can range from being the facilitator and project manager to conducting market research and completing financial analyses.

What happens after I formulate my plan?

Communication and Implementation are as critical to your planning process as writing the plan itself. KAMDEN Strategy Group is available to assist you with **Business Advisory Services** to address these phases as needed.

- The *Communication* phase involves developing plans to deliver your story to your key audiences, and managing the roll-out of your communications plan.
- The *Implementation* phase puts each of your plans into action. We assist in the oversight, development of timelines and project management to ensure each of your plans does get implemented. We also work with you to establish and implement management systems and processes to monitor progress, identify outcomes and measure results.

We will also serve as your Chief Business Advisor to help bring your strategy to life and to be your advocate when needed. Additional **Business Advisory Services** are available:

- Functioning as an outsourced Corporate Strategy Department for your company;
- Guiding the transition after mergers, acquisitions or other significant business changes;
- Offering group seminars and educational sessions focused on various aspects of running and managing your business.

Developing Your Business Plan

If creating a formal business plan document is your need, your plan can be completed

- a) by utilizing consulting resources available through KAMDEN Strategy Group,
- b) by your independent work using the aid of our *Strategy Direct Business Plan Workbook*, or
- c) by using a combination of both.

Phone consultations during the time you are completing each of the segments of your plan are included with the *Strategy Direct Business Plan Workbook*.

Additional support is also available to supplement your independent efforts. This may involve market research, data collection and analytical work. KAMDEN Strategy Group is available to help you with these additional needs upon your request.

Our work with our clients is based on their goals and the results they are seeking. If you would like to start a conversation about your needs and how we might help, we would love to listen. We'd like to work with you. Just contact us at 312.951.0360 or info@kamdenstrategygroup.com.

The Strategy Direct Business Plan Workbook

This workbook will guide you through writing a complete business plan for your company in a very user-friendly way. Each section discusses the overall strategy for that particular area (the '*what*' you plan to do) and the tactical plans ('*how*' you plan to do it).

Executive Summary

Company Description

overall description; legal structure;
history of company; ownership structure

Organization and Management Team

governing bodies (Board of Directors,
Executive Committee, etc); Advisory Boards;
key management; management contracts;
management compensation;
general description of organization

Market Analysis

market segmentation; competitive analysis
(SWOT); legal and regulatory environment;
significant business opportunities

Marketing

customer profiles; strategies for pricing,
products, services, promotion,
distribution and positioning; tactical
marketing plan; sales strategies

Business Operations

facilities; capacity; production;
quality control; daily workflow and processes

Human Resources

overall HR strategy; staffing plan;
training plan; compensation and
benefits plan; succession plans

Technology

overall technology strategy;
systems architecture; management
information systems; applications;
cost implications

Financial

overall financial strategy; assumptions;
key ratios; operating budgets; pro-forma
financial statements (balance sheet,
income statement, statement of cash
flows)

Capital and Funding Plan

equity funding; debt financing;
source and use of funds

Contingency Plans

critical success factors; critical issues;
areas of significant risk; contingency
plans

Exit Strategy

exit strategies for owners, investors
and lenders