Business Planning Process

Business Planning is a great initial service to offer your clients. It can be sold with a number of other services including Quarterly Coaching and Cashflow Management.

MARKETING

Facilitator identifies the need for Business Planning during a CCR, seminar, discussion, or from an enquiry

Discuss the client's current situation and the benefit of having a Business Plan, provide client with Outline and Benefits and confirm they would like a proposal

SELLING

Use the Proposal Scoping Notes if not yet clear on the client's Objectives, Measures of Success and Value

Prepare and send proposal from The Gap Portal, cc Marketing and Admin → Update CRM system

Client accepts proposal by due date?

- NO → Facilitator follows up with client to discuss proposal → Client accepts proposal?
  - YES → Mark open proposal as won in The Gap Portal
  - NO → Mark open proposal as lost in The Gap Portal → Update CRM system
- YES → Mark open proposal as won in The Gap Portal

Finance raises invoice

DELIVERY

Admin calls client and schedules a Business Planning session, books a meeting room and updates Facilitator's diary

Send Confirmation and Pre-work Email via The Gap Portal

Online pre-work submitted by due date?

- NO → Call client to request completion of online pre-work → If required, resend pre-work email from completed work tab in The Gap Portal
- YES → Call client to give a 24 hour meeting reminder

Prepare for the session as per Administration Support Checklist

Facilitator reviews the pre-work and any other relevant information and notes common themes, familiarises themselves with the Delivery Notes

Log into The Gap Portal and open Business Plan and Meeting Minutes in separate browser tabs

Deliver the session following the agenda format on the pre-prepared flipchart, referencing the Delivery Notes to help the attendees brainstorm on the blank flipchart

Complete the Business Plan during the planning session and capture additional notes, key projects, next steps, etc. in the Meeting Minutes

Finalise and download Meeting Minutes, then attach to Business Plan and send to the client via The Gap Portal

REVIEW

Marketing sends Feedback form to the client via The Gap Portal

Review completed feedback, create testimonial if client gave permission, and add to website

If client is not undertaking Quarterly Coaching, add an action in The Gap Portal to follow up in 90 days to see how they are went with completing their actions and suggest Quarterly Coaching to be held accountable to their actions

11 months after Business Planning session contact client to discuss updating their Business Plan. Send proposal and follow the above steps, sending the Business Planning Annual Review session pre-work in place of the initial pre-work

Key:

- Marketing
- Administration
- Operations
- Finance

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