

BUSINESS NAME

**BUSINESS
PLAN**

Completed by
XXXXXXXXXXXX

2008

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EXECUTIVE SUMMARY

This business plan can be summed-up in the following key points:

1.0 BUSINESS PROFILE

1.1 ABOUT US

Laird McPhee provides leading-edge taxation and accounting advice. We were established over 75 years ago and have a vast amount of accumulated expertise. We also help our Clients with taxation planning, business development, superannuation and retirement planning. Our team consists of over 30 highly trained professional accounting, business and administration staff. We have offices in Gympie and Bundaberg.

1.2 OUR MISSION

Our mission is to help our Clients pay less tax, be compliant and build better businesses.

1.3 OUR VISION

Our vision is a future where we partner with our Clients to create thriving businesses.

Our expertise and communication skills are focused to help our Clients achieve this.

Our value is seen in the advice, service and support we provide our Clients.

Our 'best practice' attitude is found in our people, our work and our technology across all of our offices from Brisbane to Bundaberg.

Our annual revenue before the end of the year 2012 is \$XXXXX.

1.4 OUR VALUES

- 1. Excellence** - Our Company's growth and future success will be founded upon identifying, developing and implementing excellence by way of 'best practices'. We believe that to achieve excellence there needs to be continuing innovation, reinvention and reorganization.
- 2. Quality** - Our aim is to always produce a final service that is second-to-none. This service will be founded on quality, care and personal pride. No work will ever leave our office without being rigorously checked, scrutinized and added-to.
- 3. Service** - We strive to deliver the kind of service that not only minimizes tax and increases your profits but also one that continues to meet your needs. We will do this through face-to-face meetings, phone contact, email, other advisory services, our web site and more.
- 4. Value** - The value we bring to you will be realised not only by the amount of tax we save but also through the additional advice, guidance and support we provide. We want to help you create a better business and as such we are always looking at ways and means to make this happen.

BUSINESS PROFILE

1.0 BUSINESS PROFILE

1.7 BUSINESS OBJECTIVES

Before 30 June 2009

Achieve yearly revenue of

Achieve profit of :

Before 30 June 2010

Achieve yearly revenue of

Achieve profit of :

Before 30 June 2011

Achieve yearly revenue of

Achieve profit of :

Before 30 June 2012

Achieve yearly revenue of

Achieve profit of :

2.0 SERVICE AND MARKET ANALYSIS

2.1 SERVICES

2.0 SERVICE AND MARKET ANALYSIS

2.2 MARKET ANALYSIS

Seasonal trends:

Major Client influences and influencers:

Price sensitivity:

What is our competitive edge/what makes us unique and stand out?

2.0 SERVICE AND MARKET ANALYSIS

2.3 SERVICE AND MARKET ANALYSIS ACTION ITEMS

What

1.

2.

3.

4.

5.

6.

3.0 THE MARKETING PLAN

3.1 CLIENT PROFILE

- Our Client profile includes Businesses with:
 - 5 + employees
 - Turnover > \$ p.a.
 -
- Key markets include

3.2 COMPETITOR ANALYSIS

- **Main competitors include:**

3.0 THE MARKETING PLAN

3.3 MARKETING STRATEGY – examples only

1. 'Know Thy Client Well'

- The first step in our marketing process is to understand our Clients and we do this by:
 - Database profiling across industry, income, size, geography, turnover etc
 - Establishing a research benchmark that give us an insight into how our Clients and ex-Clients perceive us, value the service we do, what we can do better...
 - Understanding where we can find more of the 'best' Clients

2. 'Know ourselves even better'

- Develop fact sheets on all our products
- Be clear on what the benefits are – how does this help the Client
- Package, present and market our products better than anybody else

3. Clean-up our database

- Have one database that is up-to-date, complete and has all email, fax and mail contact details
- Make the database easy to manage, navigate and extract data and lists from
- Put data capture protocols in place to ensure consistency of data (for Reception & Team Admin)

4. Build a brand that we are proud to stand behind

- Create a brand that is real, tangible and makes a promise it can deliver on
- Develop a values-based brand that stands for our values

5. Make sure the staff buy the company before anyone else

- Provide a clear vision, mission & values of the company and integrate these into everything we do
- Reward team members for the 'right' behaviours that support our values
- Build the right work place and environment that inspires, uplifts and motivates

3.0 THE MARKETING PLAN

3.6 MARKETING ACTION PLAN

What

1. Database clean-up
2. Customer analysis
3. Develop product fact sheets
- 4.
- 5.
- 6.

4.0 THE OPERATING PLAN

4.1 COMPETITIVE ADVANTAGE

How can these advantages be sustained and developed?

7.0 THE FINANCE PLAN

7.0 THE FINANCE PLAN

KEY TIMINGS 08/09

Q1 March	
Q2 April	
Q2 May	
Q2 June	
Q3 July	
Q3 August	
Q3 September	
Q4 October	
Q4 November	
Q4 December	
Q1 January	
Q1 February	
Q1 March	
Q2 April	
Q2 May	
Q2 June	