

Business Plans

Most owner-managed businesses have grown organically, based on expertise and valued products & services. When it comes to taking those businesses to the next level, adding experience and expertise is vital.

A Business Plan provides direction for your everyday business activities. It keeps you focused on what's most important and effective for your business.

Crafting a Business Plan is an exercise that enables you to determine what's most important, set timelines and establish actions which result from reaching or not reaching set goals. **Smart Foundations** works with you to channel your thinking into the areas with the highest impact for your business.

Executing a Business Plan is like walking through a to-do list for success. It gives structure and direction to your business development efforts. It enables measurement of success, and guides you through the process of both short and long term growth.

Measuring Success

One of the great benefits of a business plan is that it lays out defined targets for:

- Financial success – revenue, cashflow, backlog, & profitability
- Operational development
- Business Development initiatives
- Customer goals & service guarantees
- Customer retention & attraction
- Communications plan
- Expansion plans – adding staff, offices, channels, expanded offering & demographic targeting



In addition to setting targets, you need to be able to describe:

- Checkpoints to track progress in each of these areas
- Remedial activities if you fall short of your targets
- Augmented activities if you over-achieve, or reach these goals early
- Milestones – trigger points for planned growth.

What's in a Smart Foundations Business Plan

Every company & industry has unique requirements for inclusion in a business plan. **Smart Foundations** assists you in designing a custom plan to encompass your short and long term goals.

A **Smart Foundations Business Plan** is actionable – a roadmap for success. Your business plan will be crafted to meet Canadian Banking Association standards, so that it answers the needs of financial service providers.

- **Situation**
- **Market Characteristics**
- **Competitive Landscape**
- **Positioning & Differentiation Target**
- **Market Overview**
- **Business Growth Goals**
- **Customer Development Plans**
- **Financial & Customer Goals**
- **Business Development Plans**
- **Progress Monitoring & Adjustments**
- **Expansion Plan**
- **Communications Tactics**
- **Operational Plan**
- **Project Timeline**



Price: \$2500. Timeline: 6 weeks.
Modifications available on an à la carte basis.

If your business plan is designed to secure financing, we can work with your capital provider to ensure comprehensive inclusion of all requirements. Because **Smart Foundations** works to CBA standards, your business plan will answer the questions asked by bankers.