

## Greyfly - Business Planning Advice

### We see the wood from the trees

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At that time when your business needs to grow or become more efficient, independent consultation helps. Here at Greyfly we propose a **THREE-STEP APPROACH** to creating a Business Plan and believe in rapid implementation during creation.

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# THE CHALLENGE

## 1 WHERE do you want to be?

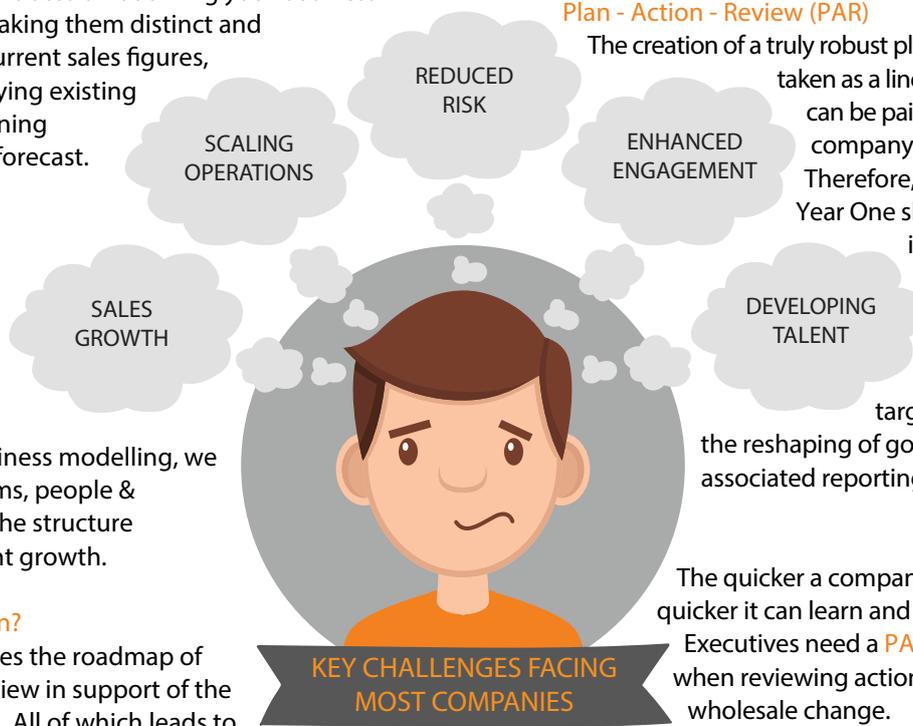
The WHERE stage concentrates on outlining your business' vision and objectives, making them distinct and executable. Analysing current sales figures, competition and identifying existing weaknesses before planning your Sales strategy and forecast.

## 2 HOW will you operate?

The HOW stage assesses operational requirements to ensure that the business is optimised. Through business modelling, we identify process & systems, people & supplier capability and the structure required to drive efficient growth.

## 3 WHEN can it happen?

The WHEN stage identifies the roadmap of implementation and review in support of the WHERE and HOW stages. All of which leads to a successful transformation. It includes items such as the budget, delivery and change plan, as well as fundraising requirements.



### Plan - Action - Review (PAR)

The creation of a truly robust plan takes time and when taken as a linear process, activities can be painfully slow before your company is ready to succeed.

Therefore, preparing activities for Year One should be designed and implemented as quickly as possible. The required activities depend on current operations status and the targeted plan but often include the reshaping of governance structures and associated reporting.

The quicker a company gets on with this the quicker it can learn and stabilise its operations.

Executives need a PAR mindset and must react when reviewing actions – sometimes even with wholesale change.

## BUSINESS PLAN STRUCTURE

<b>1. THE BUSINESS</b> <ul style="list-style-type: none"> <li>Background</li> <li>Vision &amp; Objectives</li> <li>Success Measures</li> <li>Products/Services</li> <li>Improvements</li> </ul>
<b>2. MARKETING</b> <ul style="list-style-type: none"> <li>Marketing Objectives</li> <li>Target Market</li> <li>Market Characteristics</li> <li>Competition</li> <li>Positioning</li> <li>Sales Channels</li> <li>Action Plan</li> </ul>
<b>3. OPERATIONS</b> <ul style="list-style-type: none"> <li>Operating Model</li> <li>Business Systems</li> <li>Assets &amp; Buildings</li> <li>Suppliers</li> <li>Commercial &amp; Legal</li> </ul>
<b>4. DELIVERY PLAN</b> <ul style="list-style-type: none"> <li>Schedule</li> <li>Dependencies</li> <li>Organization Structure</li> <li>Management Skills</li> <li>Governance</li> <li>Risks</li> </ul>
<b>5. FINANCIALS</b> <ul style="list-style-type: none"> <li>Sales Forecast</li> <li>Cash Flow</li> <li>Balance Sheet</li> <li>Assumptions</li> <li>Sensitivities</li> <li>Funding</li> </ul>
<b>6. APPENDICES</b> <ul style="list-style-type: none"> <li>Financials</li> <li>Competitor Analysis</li> <li>Market Research &amp; Testing</li> <li>Product Specifications</li> <li>Job Specifications</li> </ul>

Key: WHERE ■ HOW ■ WHEN ■

The following sets out the core structural components of a winning business plan.

### Chapter 1

- Vision & Objectives: includes what happens at the end of this plan including any intention to float or sell business
- How will you measure success?
- What products and/or services are being provided?
- How can the current company output be improved?

### Chapter 2

- The marketing objectives
- Customers: includes market size and traits
- Positioning against key competitors
- Promotion: includes sales channels and process
- Sales & Marketing Plan: includes sales organisation

### Chapter 3

- Identification and assessment of the operating model
- Business systems: including infrastructure, software and product/service systems and any data/IP
- Assets: includes buildings, plant, machinery, vehicles
- Suppliers: includes supplier contract and relationships

### Chapter 4

- The implementation plan, key milestones and dependencies
- Organization structure, key job roles including management
- Governance: includes meeting objectives, agenda, frequency
- Risks: includes assessment of priorities and mitigation plans

### Chapter 5

- Financials: includes cashflow by product/service
- Sensitivity based on key assumption drivers
- Identification of any funding requirements and timing hotspots

# ABOUT GREYFLY

## OUR RESULTS



"Lloyd programme managed both the Roath Lock Studios programme and the case for approval of a new Wales Broadcasting House. Whilst operating within a complex environment, both multi-million pound programmes were delivered impeccably and over and above my expectations. I would highly recommend him to navigate the tricky waters of any organisations major change / transformation undertakings."

Gareth Powell  
COO, BBC Cymru Wales



"The time with Lloyd and the Greyfly team changed our business - we're now implementing our plan to triple the size of our company over a 3 year period"

Dave Morgan.  
Director, 22 Design Ltd.



"Greyfly really have helped us See the Wood from the Trees – we continue turning our super-tanker!"

Eric Rossetti  
Managing Director, MR Systems



"Having worked on two major projects with Lloyd, I'd happily say I'd work on a third."

Alun Jones  
Programme Director, BBC

## WE ARE GREYFLY

Greyfly services centre upon business planning, project delivery and talent development.

We focus on supporting clients to "See the Wood from the Trees". We complement existing teams by providing expert external support resource. Our business advice is based upon expertise in results-driven delivery.

As external business advisors, our team can work with you to determine plans for growth, cut costs, implement projects or develop staff. We create realistic and achievable business plans for companies but also support them through to success. We only work with clients who are looking to grow or need help to be turned around and we always build long-term relationships based on trust, respect and mutual success.

We believe in more than the traditional client / consultancy relationship. We want to help build your businesses, create a vision, help you scale and give back.

Contact us on 0117 909 4148 or at [advice@greyfly.co.uk](mailto:advice@greyfly.co.uk) for a discussion on how we can help grow your business and help you to SEE the Woods from the Trees.

Greyfly 0117 909 4148 / GreyflyBusinessAdvice