
This is a sample of the assessment and investigative work we do when a Business Support Program engagement is undertaken. Depending on the client all sections may not be fully utilized.

This sample includes the Table of Contents and a few sample program pages...

For more information about the BSP or our Business Audit contact us at www.sbsassociates.biz

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BUSINESS PLANNING AND OPERATIONS

DEVELOP BUSINESS PLAN*

- **DEVELOP COMPANY VISION AND MISSION**
 1. Present situation analysis
 2. Goals and Objectives
 3. Present plans

- **EVALUATE PRESENT COMPANY STRUCTURE**
 1. Legal form of business
 2. Management team analysis
 3. Staffing: present and needed
 4. Alliances
 5. Make changes as needed to support growth

- **DEVELOP PRODUCT STRATEGY**
 1. Current and future product strategy
 2. Research and Development needs
 3. Production and delivery analysis

- **PREPARE SALES AND MARKETING PLANS**
 1. See sections on developing sales and marketing plans.

- **IMPLEMENT/STRENGTHEN STRATEGIC DECISION MAKING AND STRATEGIC PLANNING**
 1. Identify long-term goals of the company
 - a. sales or market share
 - b. product development or presentation
 - c. employment and management development

* Developing a business plan requires that many of the planning and analysis sections that follow be completed.

- d. other goals
2. Develop key performance indicators to assess progress toward these long-term goals (market share, key ratios).
3. Develop milestones showing the timing and responsibilities involved in reaching long-term goals.
4. Analyze assumptions made in developing the long-term goals of the organization.
 - a. economic conditions
 - b. industry trends
 - c. market trends
 - d. influences of government or regulatory agencies
 - e. changing technology
5. Develop and document a procedure for monitoring the environment for changes in conditions relating to the underlying assumptions and subsequent modification of long-term goals to reflect these changes.
6. Identify any problem areas which must be resolved through further research and obtain the necessary information.
7. Identify areas in which the company's risks should be minimized.
8. Restate and clarify the mission and overall thrust of the company.
9. Develop specific business strategies which support the mission and long-term goals of the company.
 - a. market strategy
 - b. product line strategy
 - c. technology strategy
 - d. operations strategy
 - e. financial strategy
 - f. strategy for corrective action or retrenchment
10. Prepare a written report for the client detailing all results of strategic planning activities.
11. Review this report with the client and revise if necessary.
12. Assist the client in implementing activities which will lead to long-term goals.