

# Business Life Plan

The Business Life Plan is an effective way of addressing the growth and succession issues you and your business are facing. We critically assess your personal and business life, and provide you with a clear understanding of where you are now, where you want to be in the future and how you're going to get there.



**The Business Life Plan provides you with a structured review of your business, its performance, areas of improvement in both your business and your personal life and it enables key, common objectives to be established in a simple 5 step process.**

## KEY FEATURES

- A Business Valuation Assessment to ascertain the current business value and act as a benchmark for growth
- A facilitated strategic planning process
- A workshop for the business owners (and spouses where appropriate)
- A tailored Business Life Plan report documenting all the key aspects of your business and business life
- Documenting goals, action plans and timelines
- The plan works closely with business owners to identify and address any areas of stress and it also includes strategies on how to reduce these stresses
- Ongoing support to help you implement your plan and achieve your goals
- Provides excellent framework for business owners to start formalising their retirement / succession strategies



ACCOUNTANTS AND  
BUSINESS ADVISORS

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"In 2011 we implemented the Business Life Plan. We found it immensely helpful as it allowed us to move our business forward to where we want to be. Having three partners of different ages and life stages causes difficulty, but the Business Life Plan allowed us to align and form a clear direction. We now have a clear picture of what all the partners want out of the business. This in turn ensured we had transition programs ready should any partners wish to retire or new partners buy into the business.

The Business Life Plan also highlighted issues that we had previously overlooked and it allowed us to implement strategies to combat them (i.e. keeping staff motivated, machinery improvements, increasing brand awareness etc).

We thoroughly recommend every business perform a Business Life Plan because it let us have peace of mind knowing that our business has planned effectively and is ready for anything."

*Rod Barrett  
P & K Joinery*

**A clear plan for your future that puts YOU in charge  
and gives you a greater chance of success.**

## THE 5 STEP PROCESS

<b>STEP 1.</b>	Completion of a <b>business performance assessment</b>
<b>STEP 2.</b>	We conduct a <b>workshop</b> with the business owners and their spouses to identify and prioritise changes and improvements and reduce Business Stress and Lifestyle Stress
<b>STEP 3.</b>	We include a <b>Business Valuation Assessment</b> , where the business is valued and you're shown how to proactively grow its value
<b>STEP 4.</b>	We provide a <b>tailored report</b> outlining the growth and succession opportunities
<b>STEP 5.</b>	We provide <b>ongoing support</b> and follow up to assist with adherence to timelines and the achievement of action plans



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