

STRATEGIC PLANNING ENABLED

Streamline Strategy Success

- ✓ **What is your current strategy and vision? Where do you want that to go?**
- ✓ **Are you creating a firm of the future?**
- ✓ **Do you have the right future organisational structure and service model?**
- ✓ **Do you have a firm succession plan?**
- ✓ **How do you get your team onboard and committed?**
- ✓ **Do you know how to implement the actions, accountabilities and timeliness efficiently?**

Many firms are helping their clients with strategy planning, but it's not uncommon for a firm not to have their own plan or not have anyone helping them stay accountable. That's where the Strategic Planning Enabled program comes in.

This is the process of creating specific firm strategies, implementing them and evaluating the results of executing the plan in regard to an accounting firm's overall long-term goals and objectives, while being held accountable.

The focus is on integrating finance management, people, processes, clients and services within a firm to accomplish its strategic goals.

Mark is an experienced consultant in the industry and knows how to ensure accounting firms reach their goals.

The best way to stay on track with your strategy and achieve your objectives is to have accountability.

Sign up and commit to an implementation program to get your Strategic Plan on target!

Receive free email & ongoing phone support.

Smithink membership included for the duration of your program.

Book a 45-minute complimentary, no-obligation online Strategy Planning Assessment with Mark. From this process, you will know where your firm is today and what you need to do to establish the right direction for your accounting firm.

How will it work?

Mark will ensure your firm's growth and success are driven by the strategy you want to achieve.

Suggested program customised to your practice:

Preliminary 45-minute assessment to find out where your firm is currently at; face to face or by Zoom depending on location.

- Do you currently have a simple strategic plan for your firm?
- When was the last time you reviewed it?
- Does your current plan have a five pillar structure?
- Do you plan well however tend to fail to execute?
- Do you have accountability around the key deliverables in your strategic plan?
- Are the team fully on board with the firm's strategic vision?

From this process you will know where your firm is today and what it needs to do to achieve success in the future.

Step 1:

The first step in the Strategic Planning Enabled process is to conduct a Strategy Implementation Planning Day.

This day is "in house" at your firm and follows a very structured process. The product of this day is a Strategic Planning Enabled Implementation plan that the firm can follow to get the right systems, processes and people resources in place.

The day will cover;

- ✓ How to formulate better strategies using a logical, systematic "five pillar" approach to strategic development
- ✓ How to create one forward focused vision for success
- ✓ How to enhance communication between employers and employees
- ✓ How to help managers and employees show commitment to the organisation's goals
- ✓ How to empower individuals working in the firm
- ✓ How to improve dialogue and communication across all stages of the accounting firm both internally and externally
- ✓ How to develop accountability measures to ensure the strategic plan stays on track

The next stages include:

- + Full day onsite meetings - quarterly
- + Video conferences to follow up actions and deal with any issues.
- + Follow up teleconferences to monitor progress between face to face meetings.

Your Investment:

Pricing is dependent on different factors and will be confirmed when you speak with Mark.

Please note - this is not a quick fix program. Each firm is different and has different goals and objectives as well as issues that need to be addressed. The program will be tailored to each firm and is for firms that are prepared to put in the work to make the changes required. Commitment to the program is integral to success. You will be guided each step of the way with ongoing support.

1st Quarterly

- Review your firm's practice strategic plan and implementation objectives.
- Getting your team on the bus – building commitment to the strategic vision.
- Developing and finding your ideal target clients.
- Agree on firm structure and infrastructure.
- Review of the firms structured workflow plan.
- Enhance and or review strategic action plan.

2nd Quarterly

- Where are we at?
- Review of the firms capacity and resource plan.
- Agree on a client engagement and service delivery plan.
- Review of form customer relationship management system
- Enhance and or review strategic action plan

3rd Quarterly

- Where are we at?
- Client feedback and satisfaction survey with constructive critique.
- Review of tools being effectively used.
- Assess future marketing activity.
- Review of key performance indicator tracking and management
- Enhance and or review strategic action plan

4th Quarterly

- Where are we at?
- Additional training as required.
- Establish next year's strategic plan.
- Development and or review of firm succession plan
- Enhance and or review strategic action plan