

Transformational Planning Check List

Purpose:

- Personal Roadmap
- Business Roadmap
- Mission
- Vision
- Values/Guiding Principles

Systems/Processes:

- Accounting
- Employee
- Sales & Marketing
- Partner/Vendor Management
- Client Management

Organizational Strategy:

- Organizational Structure
- Management Team
- Staffing
- Labor Market or Regulatory Issues

Financial Plan:

- Revenue Budget
- Expense Budget
- Projected Cash Flow

Business Strategy:

- Market Research (Market Needs)
- Products and Services
- Competitive Analysis

Implementation Plan:

- Tools
- Process
- Accountability

Business Development Strategy:

Marketing Plan

- Target Market
- Key Competitors
- Competitive Position
- Pricing Strategy
- Promotion Strategy
 - Brochure
 - Advertising
 - Networking

Sales Plan

- Client Targets
- Contact Plan (Who, How, What)
- Communication Plan
 - 30-second commercial
 - Prospecting:
 - Initial Call
 - Client Interview