



# STRATEGIC & BUSINESS PLANNING

*“Management’s most fundamental responsibility is the appropriate allocation of scarce resources.”*  
Beinhocker and Kaplan 2002

## Introduction

Management’s most fundamental responsibility is to identify medium to long term objectives and align resources to attain these goals. CIS works with clients to achieve this, taking into consideration the external environment and internal constraints. Outcomes may include development of a strategic and/or business plan, summary documents, financial modelling, and an implementation plan detailing key decisions, actions and owners to drive these decisions.

Organisations typically engage us to assist them with strategic and business planning because:

- ◆ We provide management with an effective and efficient process that considers and plans for the organisation’s future without unduly distracting management from their day-to-day activities
- ◆ We provide an experienced outsider’s perspective on the organisation’s direction and its competitive environment
- ◆ Through our process, management gain a better understanding of their business, its strategy, the assumptions behind these strategies, major focus areas and an action plan that addresses opportunity areas and limitations
- ◆ The process promotes innovation as new ideas are captured and screened and enables informed decision making
- ◆ Our approach is scalable with the level of detail provided in each aspect of the process determined by the needs and budgets of each client and our involvement ensures plans are actioned

## Our Projects

Current projects include:

- ◆ *Strategic Investment Plan for Industry Body*  
As the strengthened dollar and a handful of catastrophic weather events paved the way for an increasing number of overseas agricultural products to reach Australian shores, one major sector’s peak industry body asked CIS for help in renewing its industry strategy to guide the investment decisions for millions in annual levy funding. CIS conducted extensive consultation with a wide range of industry stakeholders, including farmers, wholesalers, retailers, researchers, and industry regulatory bodies. Over 300 participants were engaged through workshops held across the country in an effort to understand the needs of the industry’s six thousand members. In addition, a comprehensive literature review was undertaken and an economic impact assessment guided the new course laid-out by the industry’s new plan.
- ◆ *Entertainment and Sporting Opportunities Business Plans*  
A Melbourne based entrepreneur asked CIS to assist with the development of business plans for three separate opportunities in the entertainment and sporting industry. We facilitated planning meetings, undertook market research and developed the operation plans, financial models and business plans for each of these businesses. The plan was used to support each company’s capital and fund raising endeavors. We also assisted our client in obtaining grant funding to support the business plans.



CONSULTING & IMPLEMENTATION SERVICES

838 Collins Street, Docklands VIC 3008

T: 03 9081 0413

E: [gregspinks@consultingis.com.au](mailto:gregspinks@consultingis.com.au)

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## Our Services

We provide the following strategic and business planning services:



### Strategic Planning Day Workshops and Development

The key components of strategic planning include an understanding of an organisation's vision, mission, values and strategies. We provide assistance with:

- ♦ **Strategic analysis** to assess competencies, review current strategies and undertake SWOT, Porter's five forces and PESTEL analysis
- ♦ **Strategic direction setting** to define an organisation's broad direction for the next 3-5 years. This usually includes facilitation of off-site senior management workshops
- ♦ **Strategic plan development** to formalise an organisation's strategic vision incorporating operational plans and controls, KPIs and balanced scorecards



### Business Plan Development

A business plan is a blueprint of a business' future. It describes the objectives, structure, strategies, product and service offerings, target market and financial forecasts of the business for external users such as investors and customers and/or internal users. We provide assistance with:

- ♦ **Business conceptualisation** to define business goals, objectives, structure, product and service offerings and operation
- ♦ **Financial modelling** to develop the financial objectives, capital structure, financial performance, position and cash flow forecasts as well as break-even analysis
- ♦ **Business plan development** to formalise the organisation's strategies including its operational plan, marketing plan, financial models and budgets as well as outcomes of industry, competitor, SWOT and product range analyses



### Financial Model Development

Implementation is the realisation of an application, or execution of a plan, idea or model design. We provide assistance in the implementation of projects to ensure that all our client projects achieves the goals originally set and is accepted and used by the clients for whom the project is intended for. This may include:

- ♦ **Financial forecasts** including profit and loss, cash flow and balance sheet, sales and collections forecasts, purchases and payment forecasts and loan repayment forecasts
- ♦ **Financial analysis** including sensitivity analysis, scenario analysis, cost benefit analysis, net present value assessments and return on investment analysis
- ♦ **Financial modelling** including financial model templates, dynamic financial models and industry specific and customise financial models



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