

# Strategy checklist



Are you planning on growing your business?  Yes  No

1. By how much?

2. How many new customers will you need?

3. How will you get them?

4. Can you service them with your current infrastructure?  Yes  No

## First principles

What is it that you do really well?

What changes are required to service them better/ meet their needs?

How can you tell the world about this so you can scale?

**Look forward – what are the new opportunities in your marketplace?**

**Talk to your customers and target customers:**

- Questions create conversations
- Conversations lead to relationships
- Relationships create opportunities
- Opportunities lead to action

Do you have enough customers?  Yes  No

## 3 HAG

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What are your 3 year **Highly Achievable Goals**?

What is your **revenue goal** in 3 years?

## 1 HAG

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What are your 1 year **Highly Achievable Goals**?

**Capacity** – will you have too much or not enough?

If too much – how can you fill it?

If not enough – can you scale quickly if demand requires?

**Sales** – set **sales targets** for target profit level broken into months / weeks / days

**How would you like business to look like in terms of:**

Revenue \$

Required effort / time from yourself

Number of people in the business

Profitability levels

### What are the top 3 needs of your customer?

### Innovation is the only insurance against irrelevance – **how are you innovating?**

### Would you and the business benefit from a quarterly meeting, where we can:

- |  |   |
|--|---|
| <input type="checkbox"/> Review your numbers                                       | <input type="checkbox"/> Set some goals           |
| <input type="checkbox"/> Thrash out strategy ideas                                 | <input type="checkbox"/> Manage the tax positions |
| <input type="checkbox"/> Discuss what is holding the business back from it's goals | <input type="checkbox"/> Create the future        |

### Would you like to complete a business scorecard to gauge how your business is performing across 5 key areas:

- |  |   |
|--|---|
| <input type="checkbox"/> Data for good decision making | <input type="checkbox"/> Operational performance          |
| <input type="checkbox"/> People and culture            | <input type="checkbox"/> Business value and profitability |
| <input type="checkbox"/> Brand and customer experience |   |

## Remember!

Should you have any questions or require any assistance, contact your accountant or a member of our [Focus Advisory](#) division today.

