

# STRATEGIC PLANNING

Assisting businesses to define, direct & make decisions to achieve their goals



**KOUSTAS+CO**  
CHARTERED ACCOUNTANTS



## the WHY

The key objective of a strategic planning process is to provide clear direction to the key stakeholders of the business. It also assists the owners in monitoring and controlling the implementation of strategies within the business to create focus, energy, incentive and fun for the team involved.

Once completed, the document becomes a key element to future decision making and creates a culture of accountability. It can also be provided to providers of capital, including banks, potential investors or acquirers, members of the board and professional advisors.



“...A STRATEGIC PLAN BECOMES THE  
BASIC ROADMAP TO SUCCESS”



## the HOW

The process commences by understanding the “NOW” issues – essentially a diagnostic of the business as it currently stands.

The next step involves the facilitation of a 2 day strategic planning workshop to identify the major issues confronting your business. Broadly, this workshop addresses 7 simple questions:

1. Who?
2. What?
3. When?
4. Where?
5. How?
6. Why? and the always difficult;
7. But, should we or shouldn't we?

During the 2 day workshop, we also complete “the page behind the page” to identify the businesses sustainable competitive advantage.

There are four key decisions in the strategic planning process:

1. Getting the right people (aligned with the core values and purpose)
2. Long term goal
3. Strategy
4. Short term focus – critical numbers for the year and each quarter

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# the WHAT

## DAY 1

- Go through and complete an in-depth exercise of how to design the business you want – your why and your business plan;
- Overview of the One Page Strategic Plan – create a realistic growth plan, define the culture you want, agree on your core values, discover your why and complete a strategic SWOT analysis;
- Work with your fellow decision makers and peers to define and articulate the values of your business;
- Set targets, critical numbers and capabilities to help you to unlock the future potential of your business with respect to:
  - 3 year, 1 year, quarterly metrics – set your BHAG, 3 & 10 year goals
  - Results driven projects and initiatives;
  - Individual KPIs and personal accountabilities for all team members
- Team dinner and drinks

## DAY 2

- Identify your relationship & productivity drivers
- Set your brand promise, KPIs, targets, goals and initiatives
- How to create and introduce Themes and Celebrations to your business that will get your team energised and motivated to achieve the set goals on a quarterly basis
- Help you understand how to effectively keep your team accountable to the targets and initiatives you set

We guarantee you'll leave with:

1. A completed one-page strategic plan, unique to your business, developed over two days;
2. Individual KPIs and responsibilities for all team members;
3. A 90 day action plan that you can implement straight away; and
4. The knowledge and content to educate your team and implement the plan in your business.



“...A WELL-CRAFTED STRATEGIC PLAN GETS EVERYONE ON THE SAME PAGE.”

# our POINT OF DIFFERENCE



It's one thing to offer a Strategic Planning service but much like everything – context and experience are both paramount. In this respect, the team at Koustas & Co are veterans of the OPSP process and believe in the methodology so much that the Directors and team members of the firm subject themselves to the very same process each financial quarter. It's a constant area of focus that leads itself to making better and more timely decisions and open and honest lines of communication.

Importantly, our experienced professionals spend considerable amounts of time with clients during the pre-workshop planning and post-implementation phases to ensure that the strategic plan formulated during the workshop is both meaningful, relevant and implemented to its fullest extent.



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## To learn more

about how we can provide you with expert financial support, contact Matthew, our Business + Practice Development Manager.

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