

## Integrated Operations, Finance, Sales & Marketing Plan

Timeframe	Deliverables
<p>First 10 Working Days</p> <p>Deep Dive Integrated Plan</p>	<p><b>Onsite Assessment</b></p> <ul style="list-style-type: none"> <li>• Discuss Business Owner Personal and Professional Goals</li> <li>• Discuss Company Background and Intentions</li> <li>• Review Key Documents:               <ul style="list-style-type: none"> <li><b>Business Plan</b></li> <li><b>Operations Plan</b></li> <li><b>Finance Plan</b> <ul style="list-style-type: none"> <li>• Finance Processes and Internal controls</li> <li>• Budgeting and Forecasting</li> <li>• Reporting</li> </ul> </li> <li><b>Sales Plan</b></li> <li><b>Marketing Plan</b></li> </ul> </li> <li>• Review Sales Collateral Materials</li> <li>• Review Sales Activities and Results</li> <li>• Review Marketing Materials</li> <li>• Review Marketing Activities and Results</li> <li>• Tour Facilities and Review Operations</li> <li>• Interview Key Personnel</li> <li>• Write and Present Report on Key Findings and Areas of Opportunity</li> </ul>
<p>Next 15 Working Days</p> <p>Deep Dive Integrated Plan</p>	<p><b>In-depth Analysis</b></p> <ul style="list-style-type: none"> <li>• Situation Analysis</li> <li>• Review of Key Areas Uncovered in the Assessment               <ul style="list-style-type: none"> <li><b>Operations</b> Forecasting, Design, Manufacturing, Assembly, Testing, Inventory, Warehousing, Delivery, After Sales Service</li> <li><b>Finance</b> Process, Cost Control, Management, Treasury, Purchasing, Reports, Records</li> <li><b>Sales</b> Analysis by Product, Customer &amp; Opportunity, Profit and Margin Review by Product and Client</li> <li><b>Marketing</b> Situation Analysis, Product/Service Review, Target Definition, Competitive Analysis</li> </ul> </li> <li>• Case Studies - Negative and Positive</li> <li>• Strengths and Weaknesses</li> <li>• Opportunities and Risks</li> <li>• Interim Presentation and Discussion</li> </ul>

Timeframe	Deliverables
<p>Middle 15 Working Days</p> <p>Deep Dive Integrated Plan</p>	<p><b>Develop Recommendations</b></p> <ul style="list-style-type: none"> <li>• Areas to Focus on that Increase Value and Drive Growth</li> <li>• Recommendations for Required Changes                             <ul style="list-style-type: none"> <li><b>Operations</b> Process Optimization</li> <li><b>Finance</b> Infrastructure, Process, Reporting</li> <li><b>Sales</b> Infrastructure, Planning, Training, Managing</li> <li><b>Marketing</b> Customer Definition, Brand and Product Offering, Brand Positioning</li> </ul> </li> <li>• Strategies for Growth: Company, Product/Service, Market, Sales, Communications</li> <li>• Interim Presentation and Discussion</li> </ul>
<p>Last 10 Working Days</p> <p>Deep Dive Integrated Plan</p>	<p><b>Develop The Action Plan</b></p> <ul style="list-style-type: none"> <li>• <b>Action Plans</b> for Operations, Financial Processes, Tactical Sales and Marketing Activities</li> <li>• <b>Creative Direction</b> for Sales Collateral, Website and Digital Communication, Direct Marketing and Promotion, Social Media, Advertising, Media Relations, Trade Shows and Sponsorship</li> <li>• <b>Blocking Chart Calendar</b> for Responsibility, Budgets, and Timing</li> <li>• Final Presentation</li> </ul>

**Next Step Proceed with Plan Implementation.**

## Preparing Businesses for Sale

OPERATIONS FINANCE SALES MARKETING

*"Transitioning a business,  
is a marathon....not a sprint."*  
Eric Gilboord

