

# THE ROBERTSON'S STRATEGIC PLANNING PROCESS



## *One day, One plan, One success story*

The Robertson's Strategic Planning Process delivers you a strategic plan that will guide your current and future business decisions, keeping you focused on what you need to do to succeed.

The process takes only a few hours of your time, for years worth of detailed planning.

At the planning day, you have the opportunity to discuss your personal and business goals with an independent business specialist – someone who knows you, and someone who knows how successful businesses operate. We listen, discuss and debate, and then within two weeks Robertson's develops a strategic plan that includes: your overarching vision, your specific goals and objectives, and an action plan to achieve your objectives within achievable timelines.

You can choose a half or full strategic planning day, which typically follows the format below:

Review of your personal goals	30 minutes
Clarification of your business vision	45 minutes
Review of your business goals	60 minutes
Identification of profit improvement potential	30 minutes
Analysis and Brainstorm Session - looking at: management issues, team members, products and services, customers, competitors, suppliers, financial systems, opportunities and threats, and anything else that may come up.	3-4 hours
Other items (premises, technology, etc)	30 minutes
Determine areas for early yardage	30 minutes
Develop action list and prioritise actions and agree on plan moving forward	60 minutes

*“Converting a business vision into a set of realistic goals is perhaps the most difficult and time-consuming aspect of the planning process, and more often than not, despite its importance, it is the job that does not get done on its own.”*

**Gilbert Robertson** DIRECTOR  
ROBERTSON CHARTERED ACCOUNTANTS

Robertsons Chartered Accountants, helping local businesses with:  
**Business Development – Start, Buy, Exit Strategies – the Accounting Essentials.**