



Business plan sketchbook

Guide

This sketchbook is designed to help you map out a compelling future. It's based on the [Kingmakers ESP Framework](#), which you should review, before completing this sketchbook. You can download it from the resources section of our website.

Composition

The sketchbook starts with some high-level questions to set the scene. Then there are five tables that relate to key aspects of your firm and seven areas of focus in each section. There are no right or wrong answers, no need to address each area and no need to fill up all the space provided. Just focus on the areas that interest you and jump around as much as you need to. There is a Plan Summary page at the end, so you can bring everything together into a plan and further space at the end if you need to write more notes.

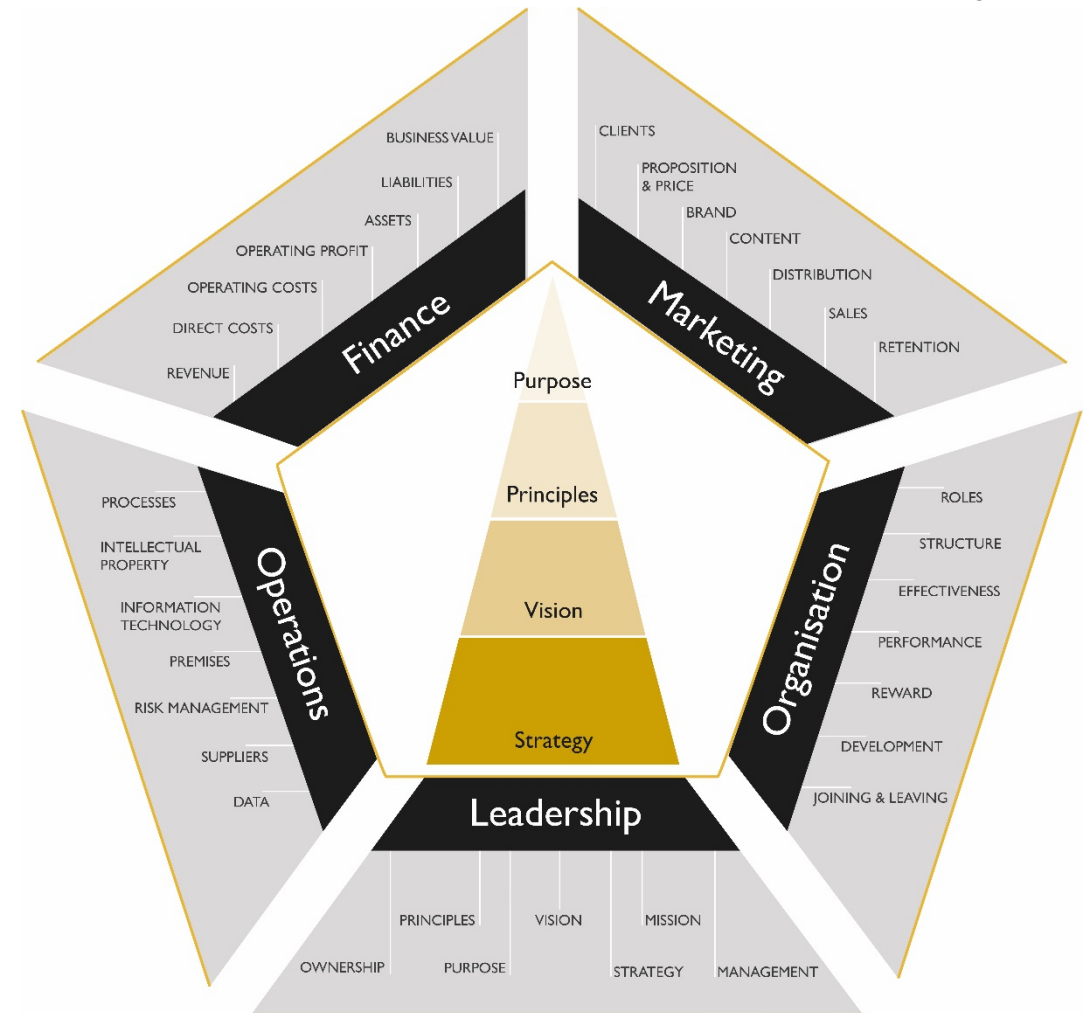
Framework

The table format has three columns; current state, possible action and desired state. To help with the thought process, it's a good idea to start with the desired state (with reference to your challenge and timeline), then detail the current state and finally consider a possible plan of action to close the gap.

Keep the challenge or opportunity you currently face in mind as you go through the sketchbook, as it will help provide useful context. When you've worked your way through each area, make sure you review your notes and look for patterns. There should be a small number of trends emerging and these will become the strategic planks on which you build out a robust plan for progress.

Finally, once you've created your Plan Summary, you can build out the next levels of detail for your functional plans, any project plans and eventually, plans for each individual in your organisation. What you should end up with is a carefully considered plan, with goals and action plans cascaded down to every individual in your firm.

This sketchbook is a useful tool to stimulate thought, challenge perspective and increase awareness and perhaps responsibility. It is part of a series of tools created by Kingmakers, to help forward-thinking individuals to realise their ambition. For more information visit www.kingmakersgroup.co.uk



This work is licensed under the Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-nd/4.0/>

Questions to set the scene

1. What is your vision for the firm and what's your timeline?

2. What are the primary challenges this situation surfaces?

3. What are the primary opportunities that, if acted on, will help you capitalise on this situation?

4. What do you think your options are?

Marketing

Area	Description	Current State	Possible Action	Desired State
Clients	The client segments we work with, how defined they are, the typical characteristics & how good we are at winning new clients in these segments.			
Proposition & Price	The solution(s) we offer, value for money and fit with client segments.			
Brand	The market perception of our firm, the logo & images we use to represent ourselves & the collateral we use.			
Content	The material we create to help engage prospects and bring them through the process of engagement & how it helps win new clients.			
Distribution	The quality & performance of our website, social media, email, events, adverts etc in winning & retaining clients.			
Sales	The transition from marketing to engagement & our performance here.			
Retention	The content we produce for existing clients, the facilities we make available for them and the longevity of our client relationships.			

Organisation

Area	Description	Current State	Possible Action	Desired State
Roles	The various tasks we perform, grouped into defined roles and responsibilities and our resources in this area.			
Structure	How we organise our people & how this helps workflow, efficiency & risk management.			
Effectiveness	How effective and efficient our people are in their roles and what we do to improve.			
Performance	How we challenge and assess individual performance & the results it has on the team.			
Reward	The way we pay and incentivise our people and their levels of satisfaction.			
Development	How we help people grow and shape their careers.			
Joining & Leaving	How we attract, select, integrate & exit people from the firm.			

Operations

Area	Description	Current State	Possible Action	Desired State
Processes	The processes we develop across the firm, to help our people deliver our proposition & manage risk across the firm.			
Intellectual Property	How we develop & manage this key resource.			
Information Technology	The systems we use to move & store data.			
Premises	Where we live & how that impacts on performance.			
Risk Management	The systems & processes we use to manage risk & how well we do at it.			
Suppliers	The extra resources we need & how efficient we are at managing these relationships.			
Data	The way we create, process and report on all the data that flows through the firm.			

Finance

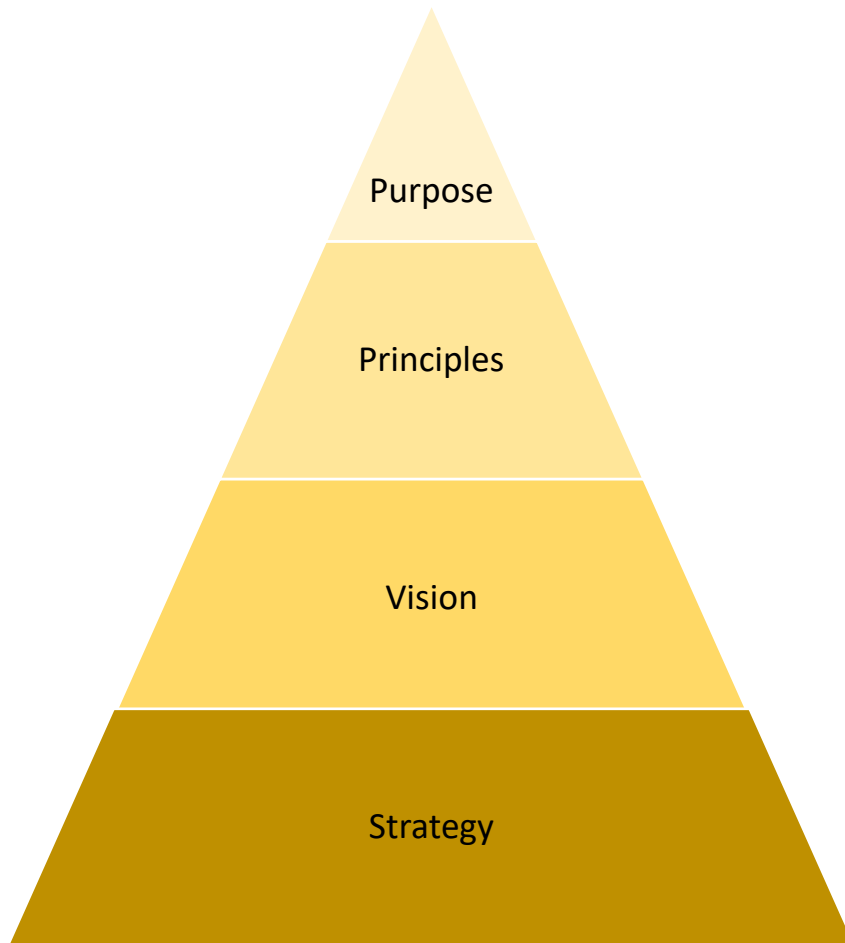
Area	Description	Current State	Possible Action	Desired State
Revenue	The quality and quantity of income we receive, consistency and growth.			
Direct (flexible/variable) costs	The direct cost of delivering the proposition and the amount we retain after deduction (gross profit margin).			
Operating (fixed) costs	The income we keep after direct and fixed costs & how well we've done at managing costs.			
Operating Profit	The income we keep after direct and fixed costs, how well we manage cashflow and profit growth achieved.			
Assets	The assets we own & how we utilise, manage and develop them over time. The acquisition of new assets.			
Liabilities	The liabilities we have (including short & long-term debt, tax etc) and how we utilise, manage and reduce them over time.			
Business Value	The potential value of the entire organisation and how that builds over time.			

Leadership

Area	Description	Current State	Possible Action	Desired State
Ownership	The structure of our legal entity (or group structure) it's effectiveness & the suitability of our ownership structure.			
Principles	The values & principles that guide our teams' behaviours, decision making and as a result, the culture of our firm.			
Purpose	The primary goal of the organisation & the extent to which we pursue it. Could be framed as the firm's purpose, why or passion.			
Vision	What we are trying to become and how broadly the owners' vision is shared & actively pursued.			
Strategy	The way we plan to compete in our chosen market, how effective we are at doing so, the way we deploy resources and hold ourselves to account for goals.			
Mission	A summary of where we are headed and the goals we are currently focussed on, along with our timeless operating principles.			
Management	The group of people executing the firm's plans, the structure followed, decisions made, MI used and communication throughout the team.			

Plan summary

Use the space below to summarise the long term aspects of your plan.



Purpose:

Principles:

Vision:

Strategy:

Our plan



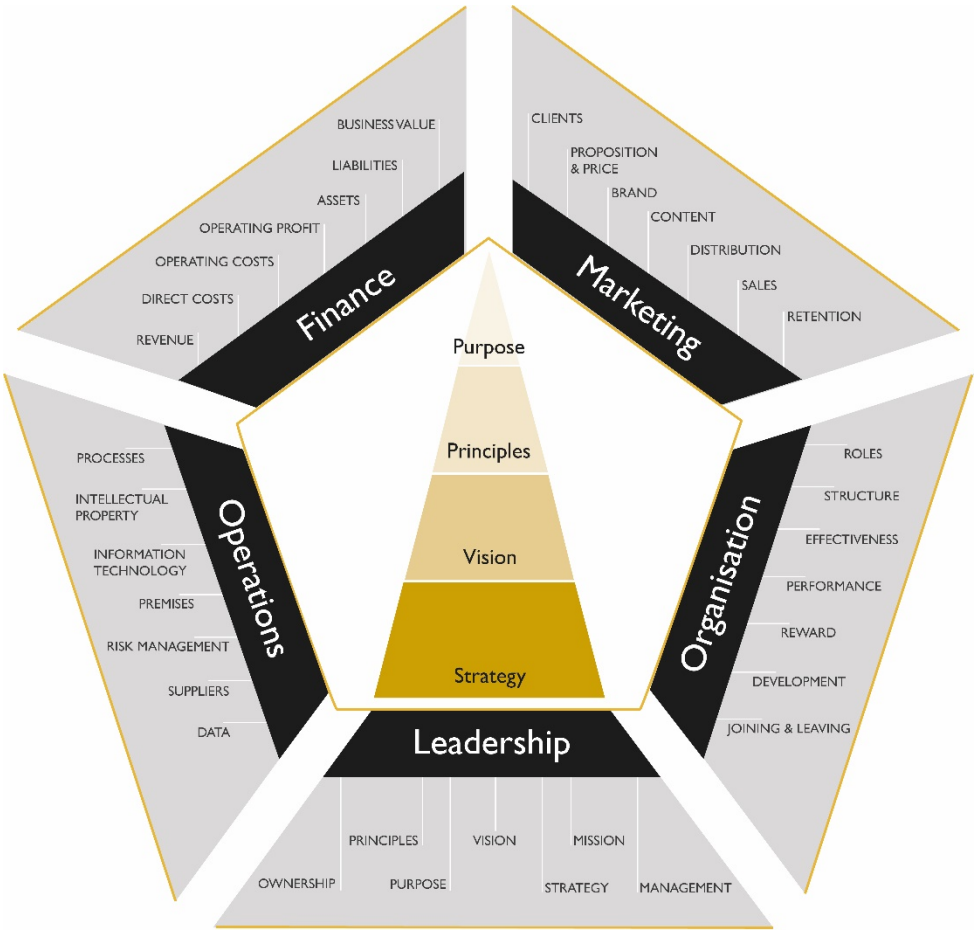
Finance goals:

Marketing goals:


Operations goals:

Organisation goals:

Leadership goals:



Notes



“Happiness is reality
minus expectations”

- Elon Musk

