



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

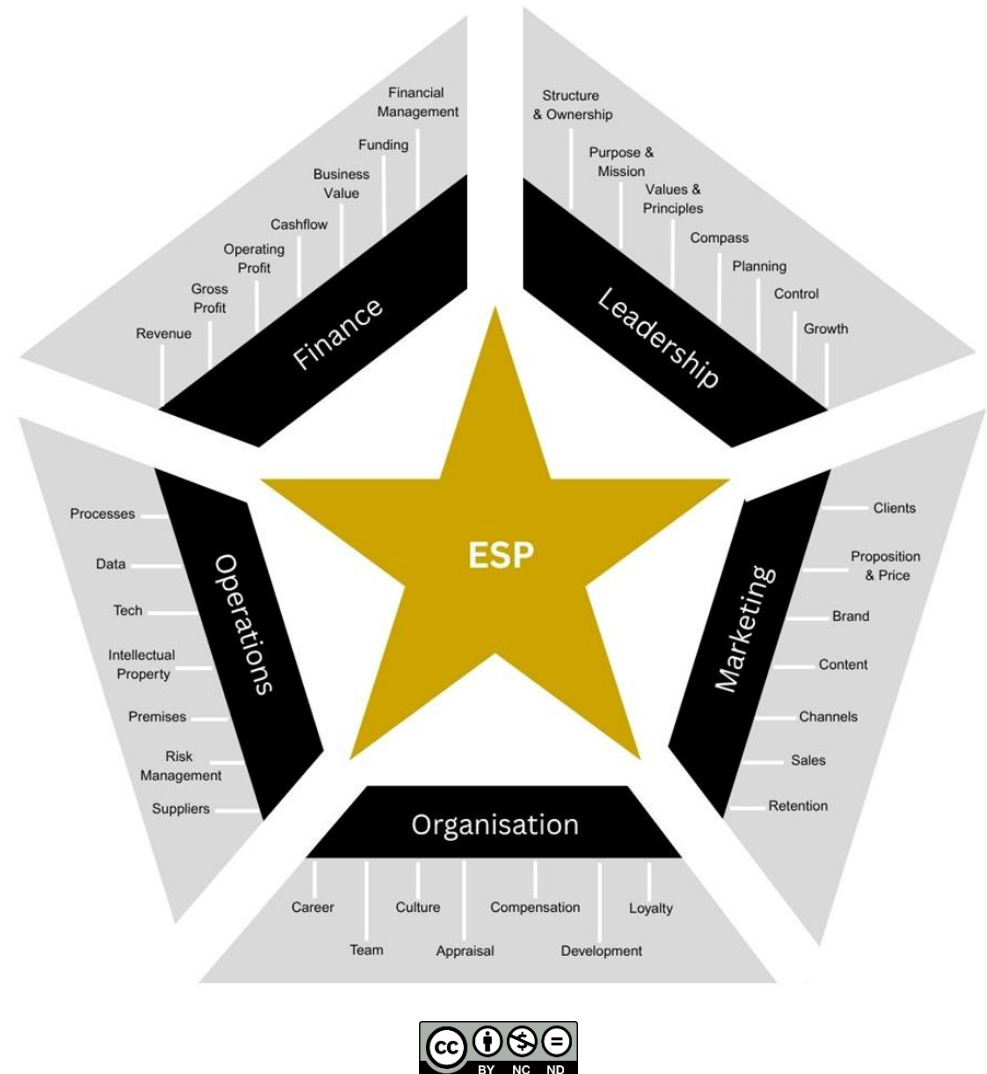
The table format has three columns; current state, possible action and desired state. To help with the thought process, it's a good idea to start with the desired state (with reference to your challenge and timeline), then detail the current state and finally consider a possible plan of action to close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

If you are completing this Sketchbook as part of a planning process, you do not need to complete it and return it to Kingmakers prior to your one-to-one meeting. Use it as a thought starter. This framework will be followed in your one-to-one meeting.



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About you

No.	Question	Answer
1	How long has your career been to date?	
2	What is your current role and what are your responsibilities?	
3	How long have you been in your current role?	
4	What are your greatest challenges in your current role?	
5	What are the most significant opportunities in your current role, which, if acted on, would produce the greatest result?	
6	Do you feel that it's possible to grow in your current role?	
7	We all have a primary drive. It could be creativity, people and processes or commercial risk and reward. Do you feel you are in the right role?	
8	How much longer do you want to work and is that in your current role or a different one?	
9	Based on your compensation and any equity or options you own, and the firm's plans, are you likely to achieve financial independence?	
10	What are the demands on your time outside of work?	
11	Are there other aspects of your life that you know need addressing (like mindset, health, relationships, or personal finances)?	
12	How much energy do you feel you can dedicate to work?	
13	Given your colleagues goals, motivations and capabilities, what chance have you got of achieving your goals?	
14	Aside from money, what else do you hope to gain when you achieve your goals?	

About the firm

No.	Question	Answer
15	Does your firm create plans and is there a history of being accountable to them and hitting goals?	
16	Is the culture at the firm, broadly reflective of an acknowledged purpose and set of values?	
17	What is your long term vision for the firm?	
18	Does this differ from other senior people at the firm and if yes, how?	
19	What are the current challenges that your firm faces?	
20	Are these challenges broadly recognised throughout the firm?	
21	What are the current opportunities that your firm faces?	
22	Are these opportunities broadly recognised throughout the firm?	
23	How does the firm manage change?	
24	What should your strategy be over the next 3 to 5 years?	
25	Which resources do you need, that you don't current have, and are they obtainable?	

The following pages set out the five main areas of the firm and seven sub-categories. You can use the three columns to do a more detailed gap analysis and then summarise your plans on the final page.

Leadership

Area	Description	Current State	Possible Action	Desired State
Structure & Ownership	The entities that make up the business & who owns them			
Purpose & Mission	Why we exist & our current priorities			
Values & Principles	The concepts that guide, behaviour, decisions & culture			
Compass	Vision, resources, strategy & direction			
Planning	Approach to goal setting & planning			
Control	Decision rights, levels of autonomy & accountability			
Growth	Growth goal, strategy & results			

Marketing

Area	Description	Current State	Possible Action	Desired State
Clients	Ideal & existing client profiles			
Proposition & Price	Value proposition & business model			
Brand	The perception people have of our business			
Content	Media created to attract, educate, engage & convert			
Channels	The platforms or third parties we use to reach prospects			
Sales	The process of converting prospects to clients			
Retention	Keeping clients long term & related value			

Organisation

Area	Description	Current State	Possible Action	Desired State
Career	Job descriptions, roles, responsibilities & grades			
Team	How many of each role, structure, management			
Culture	Acceptable behaviour			
Appraisal	Evaluation of individual & team performance			
Compensation	Basic, benefits, paid leave & incentive or bonus scheme			
Development	Developing people's knowledge, skills & performance			
Loyalty	Average service of team members & how to prolong it			

Operations

Area	Description	Current State	Possible Action	Desired State
Processes	Guidance for regular tasks & activities			
Data	Recorded results of business activities			
Tech	The mix of hardware & software in use			
Intellectual Property	Proprietary tools, templates & collateral			
Premises	Physical premises & how it's used			
Risk Management	Managing regulatory & other risks			
Suppliers	Collaborations with third parties to deliver the proposition			

Finance

Area	Description	Current State	Possible Action	Desired State
Revenue	Volume, composition & performance vs forecast			
Gross Profit	Gross margin after variable costs deducted			
Operating Profit	Operating margin after all fixed costs deducted			
Cashflow	Operating profit less interest, tax, capital items & dividends			
Business Value	Overall value of the business			
Funding	Working capital, investment & debt finance			
Financial Management	Bookkeeping, accounts, forecasts and budgets			

Plan Summary

Purpose & Mission						
Values & Principles						
Vision						
Strategy						
Plans & Goals	Short		Medium		Long	
Leadership						
Marketing						
Organisation						
Operations						
Finance						
Key Tactics						



“Happiness is reality
minus expectations”

- Elon Musk

