

# ADVANCE

[www.armstrongwatson.co.uk/businessadvice](http://www.armstrongwatson.co.uk/businessadvice)

## Strategic Business Advice



**ArmstrongWatson<sup>®</sup>**  
Accountants, Business & Financial Advisers

# ADVANCE

A strategic advisory service to help business owners & leaders achieve long-term success.

For any business to succeed, there are five fundamental building blocks that need to be in place:

## Vision, People, Process, Data and Management Structure.

Business owners will be under a great deal of pressure, lack of time, vision and often lack of focus, making it difficult to devote time to these building blocks. Advance, part of our Strategic Business Advice service portfolio, helps business owners ensure that these fundamental blocks are in place, and aligned in order to allow a business to flourish and prosper.

We achieve this via our structured consulting programme, with set days devoted to each of the building blocks, providing the focus that ultimately allows all of your business decisions to be aligned and effective.

## Business strategy

Here at Armstrong Watson we understand there is no magic recipe or wand when it comes to Strategic Business Planning. We find our most successful clients invest time ON their business instead of time IN their business.

Our aim is to get business owners focused on long-term strategic goals via effective step by step planning that in turn will deliver tangible results giving the flexibility to stay ahead of the competition.

The internet is full of advice and what to do information but very few services are positioned to offer that personal 1on1 time tailored to fit a business efficiently and effectively with measured results and outcomes along the way.

### Advance provides the solutions.

Our unique tailored business advisory programme uses our expertise from around our business and network of over 300 like minded business advisors to help guide and mentor business owners in implementing effective governance structures that really produce results.

In order to achieve those results, we help business owners create their **Vision**, around which all other business decisions are focussed. This allows us to then turn to the other key building blocks of;

- having the right **People** in the right roles with the right skill-sets
- developing the right **Process** for people to follow in a consistent and effective manner, covering all internal and external roles
- agreeing the right **Data** that allows performance to be measured, behaviours to be corrected and business decisions to be taken effectively.

All of this is broken down into manageable steps.

It is essential that progress with these strategic steps is regularly reviewed by our team of advisers, so there is real accountability in ensuring the strategy is driven through the business.

Following our own recent research surveys into owner managed businesses, growth is regularly stated as a key business objective. However, despite this most do not have a well-structured strategy; this is where we can help. Owner managed businesses are at the heart of what we do. We help these businesses maximise value and profitability using a structured and well-homed approach. The most effective businesses have complete clarity on how to position their products and services; this enhances lifetime value and customer loyalty.

### This is how...

Advance Strategic Planning Service is designed to optimise this process via a trusted system enabling you to remain focused and on-track with your business giving you the confidence that support and advice is on hand throughout.

The value is in the structure and clarity that comes from the expertise of the Armstrong Watson network; the depth and strength of our advisors that have witnessed clients face the same typical challenges over many years; and the professionalism of the service we offer.

At the heart of our offering is the relationship that we build with our clients. Our initial focus is with the business owners by understanding your current position and guiding you on your journey, all tailored to your business need and aspiration.

We call this service **Advance**.

# ADVANCE

## Strategic Business Advice helps increase Legal Sector profits

*" Armstrong Watson have been our accountants for a number of years. As directors in an ever changing legal sector we found ourselves working in the business and not always running or managing it. Despite experiencing continuous growth for several years no major changes had been made to the structure of the business.*

*In 2016, we enlisted the help of Andy Poole and took part in a Strategic Business Advice session.*

*The three of us felt a little apprehensive at first, but this immediately fell away once Andy started the session and helped us find our way of focusing on our business. It felt like the mist in our heads lifted and plans and ideas started to slot into place.*

*Attending the session has had a hugely positive impact for not only us as directors, but for the rest of the team and therefore the business as a whole. We have now engaged with Armstrong Watson and their ongoing Strategic Business Advice programme.*

*We would highly recommend using Armstrong Watson for their Strategic Business Advice service to all organisations, from sole traders to national companies. "*

**Karen Walsh,  
Paramount Legal Costs Limited**

*" I would like to acknowledge the huge contribution that Andy Poole made to the success of our business planning weekend in March 2019. Andy's pre-meeting preparation, insight, experience and clarity of thought enabled us to achieve in just one working day what it would otherwise have taken us many working days to accomplish, over a much more protracted timescale. As a result of Andy's overall contribution and willingness to challenge, we identified and unanimously agreed the strategic aims which will form the essential foundation of our business plan for the next five years. Andy made an invaluable contribution to our business planning process that was not only highly productive and outcomes focused but one that was inclusive and enjoyed by all who took part. I would recommend Andy to other law firms without hesitation or reservation. "*

**Paul Bury, Managing Partner  
The Endeavour Partnership LLP**

# Day 1

## Helicopter View

# Day 2 & 3

## Documenting the Vision

Building Block	Vision - Where are you now? Where can you get to?
<b>Output</b>	<ul style="list-style-type: none"> <li>- Business owner objectives</li> <li>- Business financial objectives</li> <li>- Department/people financial objectives</li> <li>- SWOT analysis</li> <li>- Unique selling points</li> <li>- Target market</li> <li>- Routes to market</li> <li>- Messages to market</li> <li>- Challenges</li> <li>- Roles of key people</li> <li>- Action plan</li> </ul>
<b>Duration</b>	1 day

Building Block	Vision - Where are you heading? How can you get there? Documenting the plan
<b>Output</b>	<ul style="list-style-type: none"> <li>- Review of Day 1</li> <li>- Identification and agreement of:               <ul style="list-style-type: none"> <li>• Core values</li> <li>• Core focus</li> <li>• Purpose</li> <li>• 10 year target</li> <li>• 3 year picture</li> <li>• 1 year plan</li> </ul> </li> <li>- Marketing plan</li> <li>- Challenges/blocks to the plan</li> <li>- Issues to be overcome</li> <li>- Documenting the plan</li> </ul>
<b>Duration</b>	2 days
<b>When</b>	One month after Day 1 'Helicopter View'

# Day 4

## The Right People in the Right Roles

Building Block	<b>People</b> - What roles do you need? What skill-sets do those roles have? The right people in the right seats
<b>Output</b>	<ul style="list-style-type: none"> <li>- Review and confirmation of agreement of the Vision from days 1-3</li> <li>- Identification and agreement of:               <ul style="list-style-type: none"> <li>• The roles of your business</li> <li>• The skill-sets for those roles</li> <li>• An accountability chart</li> </ul> </li> <li>- Matching individuals in your business to the accountability chart</li> <li>- Identifying skill shortages/gaps</li> <li>- Agreeing a people action plan</li> </ul>
<b>Duration</b>	1 day
<b>When</b>	2 weeks after Day 2/3 'Vision'

# Day 5

## Critical numbers; managing issues; and systems to drive performance

Single day split into three sections

Section 1 - Building Block	<b>Data</b> - What are the indicators of success? What are the critical numbers? How can those numbers be measured and monitored?
<b>Output</b>	<ul style="list-style-type: none"> <li>- Identifying the critical numbers from your business, and the different systems within it</li> <li>- How to monitor the health of the organisation through those numbers</li> <li>- Embedding reporting systems</li> <li>- A scorecard to encapsulate all the critical activity</li> </ul>
<b>Duration</b>	2 hours
<b>When</b>	2 weeks after Day 4 'People'

## Day 5

Critical numbers; managing issues; and systems to drive performance

Single day split into three sections

<b>Section 2 - Building Block</b>	<b>Issues</b> - What are the barriers to success? Plan to overcome the barriers
<b>Output</b>	<ul style="list-style-type: none"> <li>- Documenting the issues identified on Days 1-4</li> <li>- Agreement on whether these represent key issues</li> <li>- Prioritising the issues</li> <li>- Allocation of responsibility</li> <li>- Plan to overcome the key issues</li> </ul>
<b>Duration</b>	2 hours
<b>When</b>	2 weeks after Day 4 'People'

## Day 5

Critical numbers; managing issues; and systems to drive performance

Single day split into three sections

<b>Section 3 - Building Block</b>	<b>Process</b> - What systems and processes should be set as standard? Documenting the 'way'
<b>Output</b>	<ul style="list-style-type: none"> <li>- Identification of the core processes covering every part of your business, including production, marketing, sales, HR, accounting and customer retention</li> <li>- Itemising the critical steps for each process</li> <li>- How to make best use of technology and making your business digital</li> <li>- Documenting, agreeing, packaging and sharing the processes</li> <li>- Embedding the processes at the heart of what you do</li> </ul>
<b>Duration</b>	3 hours
<b>When</b>	2 weeks after Day 4 'People'

## Day 6

Management structure and organisation - ensuring the plan is followed

Building Block	<b>Management structure</b> - Internal management meeting format to ensure the plan is followed
<b>Output</b>	<ul style="list-style-type: none"> <li>- Introduction of a new, effective management meeting format</li> <li>- Allocation of actions</li> <li>- Accountability for actions</li> </ul>
<b>Duration</b>	1 day
<b>When</b>	4 weeks after Day 5 'Data, Issues and Processes'

## Day 7

Lean processes

Building Block	<b>Process</b> - Applying lean six sigma principles to your production/service processes
<b>Output</b>	<ul style="list-style-type: none"> <li>- Refining your core production/service processes, building on Day 5 to convert the processes into lean six sigma systems</li> <li>- Eliminating waste, inefficiency and time blocks from your operations</li> <li>- Ensuring the right people undertake the right tasks at the right time</li> <li>- Allowing your business to be as efficient and profitable as it can be</li> </ul>
<b>Duration</b>	1 day - further days can be added as an option
<b>When</b>	4 weeks after Day 6 'Management Structure'

# Days 8+

## Ongoing support

Building Block	<b>Management structure</b> - Ongoing support and facilitation
Output	<ul style="list-style-type: none"> <li>- Facilitating quarterly newly formatted management meetings based on the structure introduced in Day 6</li> <li>- Ensuring ongoing support, critique and the ability to bounce ideas off an experienced consultant</li> <li>- Ensuring the plan is followed</li> <li>- Identification and resolution of new issues</li> <li>- Accountability for individual actions</li> <li>- Giving your business the best chance of success</li> </ul>
Duration	3 hours
When	3 months after Day 6 'Management Structure'
Frequency	Quarterly - monthly can be added as an option





# Service level options -

## What building blocks are included?

<h3>Level 1</h3> <p>Day 1</p>	<h3>Level 2</h3> <p>Days 1-6</p>
<p>Helicopter View</p> <p>Vision - Where are you now? Where can you get to?</p>	<p>Vision - Where are you now? Where can you get to? How can you get there? Documenting the plan</p> <p>People - What roles do you need? What skill-sets do the roles have? The right people in the right seats</p> <p>Process - What systems and processes should be set as standard? Documenting the 'way'</p> <p>Data - What are the indicators of success? What are the critical numbers? How can those numbers be measured and monitored?</p> <p>Issues - What are the barriers to success? Plan to overcome the barriers</p> <p>Management structure - Internal meeting format to ensure the plan is followed</p>
<p><b>Maximum participants: 10</b></p> <p>£4,195 +VAT Payable in advance</p>	<p><b>Maximum participants: 10</b></p> <p>£3,495 +VAT per month for 6 months First payment in advance of Day 1</p>

# Service level options -

## What building blocks are included?

<h3>Level 3</h3> <p>Days 1-7</p>	<h3>Level 4</h3> <p>Days 8+</p>
<p>Vision - Where are you now? Where can you get to? How can you get there? Documenting the plan</p> <p>People - What roles do you need? What skill-sets do the roles have? The right people in the right seats</p> <p>Process - What systems and processes should be set as standard? Documenting the 'way'</p> <p>Data - What are the indicators of success? What are the critical numbers? How can those numbers be measured and monitored?</p> <p>Issues - What are the barriers to success? Plan to overcome the barriers</p> <p>Management structure - Internal meeting format to ensure the plan is followed</p> <p>Lean processes - Applying lean six sigma principles to your production/service processes</p> <p>BOPP - Use of 'Business One Page Plan' software to act as the scorecard for Data</p>	<p>Management structure - ongoing quarterly support and facilitation</p> <p>Can be added to either Level 1, Level 2 or Level 3</p>
<p><b>Maximum participants: 10</b></p> <p>£2,995 +VAT per month for 8 months First payment in advance of Day 1</p>	<p><b>Maximum participants: 10</b></p> <p>£650 +VAT per month in advance</p>

All prices are subject to VAT and where applicable reasonable expenses for travel, accomodation and subsistence.

# Advance your business

Contact us to discuss your requirements in further detail and to make a booking for the Armstrong Watson Advance Business Strategy Programme:

**Andy Poole**  
Legal Sector Partner

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E: andy.poole@armstrongwatson.co.uk



*...we're with you.*

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