



# FORECASTING YOUR FUTURE

Your 12 Month Business Planning Template

**Advivo**<sup>®</sup> BUSINESS ADVISORS  
AND ACCOUNTANTS

# About Your Business



Business name:

It's okay if you're unsure of some or all of the questions below. We can help you identify/discover your answers.

Your purpose (tell us why you're in business and what your ultimate aim is for the future):

What would you like to achieve within the next year?

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## Unique Value Proposition

What is it about your business that sets you apart from your competitors, that others would struggle to copy?

Complete this sentence

We help (w) \_\_\_\_\_ to (x) \_\_\_\_\_

by doing (y) \_\_\_\_\_ and (z) \_\_\_\_\_

w = Your target customer    x = Their needs or wants

y & z = What/how your products/services address your customers' needs or wants

# Now Where How

## Where are you **NOW**?

Please provide a brief 'snapshot' of your current business.

It's okay if you're unsure of some or all of the questions below. We can help you identify/discover your answers.

Sales (e.g. what is your current turnover, per month/annum?)

Product (e.g. what is your current product/service and is it still relevant?)

Operations (e.g. how do you currently deliver your product/service?)

Finance (e.g. how is cashflow/debt? Are you comfortable?)

People (e.g. consider your organisational chart)

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## **WHERE** do you want to be in the future?

What do you want your business to look like in \_\_\_\_ months? (Ideally 12 months or less.)

Sales (e.g. what is your goal increase in turnover? Do you have underlying methodology to implement?)

Product (e.g. do you want to launch a new product/improve current products?)

# Now Where How

Operations (e.g. establish an overseas branch, innovation in how your product/service is delivered)

Finance (e.g. what does your future financial position look like?)

People (e.g. do we need people that we don't currently have, or do we have the right people with the right skills?)

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## **HOW** are we going to get there and what resources do we need?

Consider strategies or processes that should/could be implemented in your business to achieve the above. Please note multiple strategies in small measurable steps is ideal.

Sales (e.g. putting new marketing/roles/processes in place)

Product (e.g. research and implement new innovations)

Operations (e.g. what needs to change in the current operations to meet your objectives? e.g. increasing efficiency, reducing waste, increasing profits)

Finance (e.g. do we need a finance strategy to ensure we can achieve our desired goals?)

People (e.g. what additional people or skillsets do we need to achieve our desired goals?)

# Challenges & Barriers to the Plan

## WHAT are the Challenges or Barriers to executing the plan?

Barriers related to people.

Barriers related to time.

Barriers related to money.

Barriers related to Location.



# Next Steps



Congratulations on taking the first step to building a sustainable business plan to boost your business in your desired timeframe!

As a business owner, sometimes it can be difficult to know where to focus your attention. Many business owners find themselves stuck spinning the wheels and falling into the trap of becoming the person doing everything instead of the one leading. The good news is Advivo's business advisors are here to put you back on track.

Our proven methodology helps identify goals and the gaps between your current and desired states BEFORE trying to solve problems or implement strategies which may or may not result in you achieving your goals. Once your WHERE has been clearly defined and understood, your HOW is about identifying strategies which can be implemented to ensure your goals are achieved!

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## You've just unlocked an exclusive 80% discount to one of our most insightful business planning workshops!

Now that you've completed all the sections in this Business Planning Template, you've outlined what your business looks like NOW, WHERE you want to be in the future, and HOW you'd like to get there. The next step is to work through this with one of Advivo's expert business advisors who can help identify, prioritise and implement strategies to help you achieve your goals within your desired timeframe.

**This workshop is usually valued at \$2,750, but we would like to offer it to you for the heavily discounted price of \$550\*.**

Simply send us the completed Business Planning Template to set up your consultation with your exclusive discount. Don't miss out on this opportunity! This is a genuine discount and is only available to the first 25 applicants.

**Get in touch with us today to take your business to the next level!**

**SET UP YOUR  
CONSULTATION**



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 07 3226 1800  [advivo.com.au](http://advivo.com.au)  [info@advivo.com.au](mailto:info@advivo.com.au)

 Level 12, 300 Ann Street, Brisbane QLD, 4000