

WORKBOOK
2025



STRATEGIC PLANNING

A Clear Plan For Better Results



BBCS Business Advisors

Empowering You to Achieve Your Goals



021 486 6664



bbcs.ie



hello@bbcs.ie

FOLLOW INSTRUCTIONS

Before you begin, take a moment to review the entire workbook.

- Schedule time in your calendar to work through each step.
- Use the Dashboard to summarise your work and keep it handy throughout the year.
- Set a maximum of 3 goals or priorities and determine how you'll measure performance. Focus your efforts on these areas to achieve the results you want.
- On each **Write Your Plan page**, detail how you will achieve your goals, including resources, budget, timelines, and team responsibilities if applicable.
- **Track your Progress Quarterly**, or adapt the format for monthly reviews.
- Print the **Dashboard and Strategic Goals** to share with your team.
- Use these documents to guide your monthly management meetings and keep everyone aligned.

OUR ROADMAP



Your Vision (Why).

Describe your personal and business vision: why you do what you do.



Evaluate.

Reflect on the past 12 months to evaluate progress, challenges, and key achievements.



Set Goals.

Set a maximum of 3 goals or priorities to achieve in the next 12 month.



Measure Success.

What does success look like? Pick 5 KPIs to track progress.



Create an Action Plan

How are you going to achieve your goals? Map-out resources, budget, people and timelines.



Review and Adapt.

Set time aside to review on a monthly basis your performance vs your targets and adapt if things have changed.

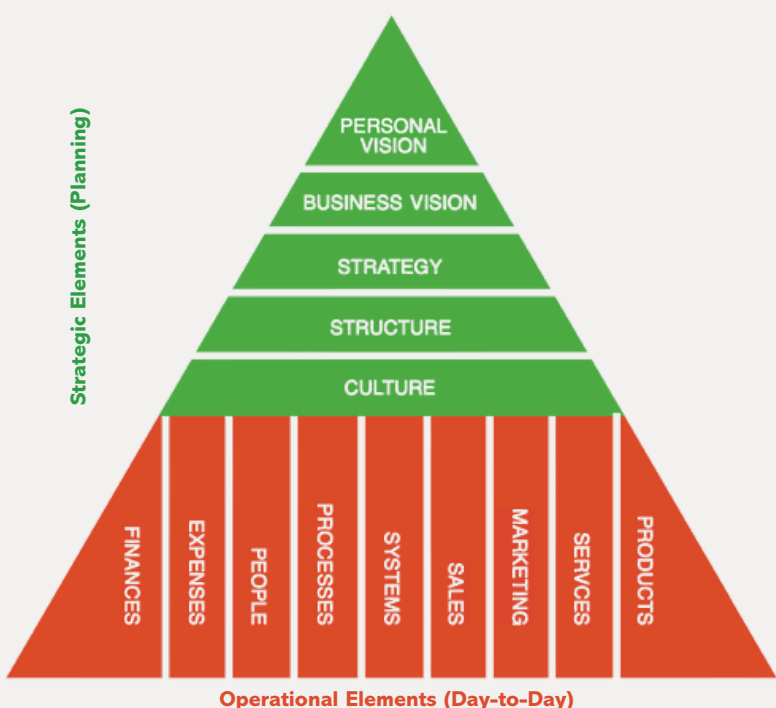
HOW WE LOOK AT YOUR BUSINESS

Since most owners begin as '**technicians**,' they tend to focus on daily operations (red areas on the pyramid), leaving little time to **plan for growth and work on strategic priorities** (green areas on the pyramid)

However, working on strategic priorities is essential because it allows you to:

- **Set Clear Direction:** Strategic priorities define long-term goals, ensuring decisions align with your business vision.
- **Drive Growth:** Focusing on key opportunities helps expand markets, improve efficiency, and boost profits.
- **Adapt to Change:** Strategic planning prepares you to anticipate challenges and respond proactively.
- **Optimise Resources:** Prioritising what matters ensures your time, energy, and finances are used effectively.
- **Avoid Burnout:** Shifting focus from daily tasks to the bigger picture enables better delegation and sustainability.

Balancing daily operations with strategy builds a stronger, more resilient business for long-term success.



Working with Andrew and Susana helped us address gaps in our business structure and gain clarity on our processes. Over several weeks, their expertise provided us with a clear vision, focused goals, and a structured plan across all our services.



We've implemented their recommendations and are already seeing significant benefits for both our business and clients. Their professional guidance showed us the value of having firm processes and a clear strategy.

Celene Collins

CEO, Celene Collins Interior Designers

STEP 1

PERSONAL VISION

Imagine yourself five years from now and describe what you've achieved in every area of your life.

Write it down in the present tense, as if you're already living it.

FAMILY LIFE

HEALTH

MONEY

HOBBIES

SOCIAL / COMMUNITY

EDUCATION / SKILLS

STEP 1

BUSINESS VISION

PURPOSE OF YOUR BUSINESS

CORE VALUES

WHO IS YOUR CUSTOMER

WHAT PROBLEM YOU SOLVE

WHAT'S YOUR UNIQUE SELLING POINT

STEP 2

EVALUATE

GO TALL & PROUD

What are your biggest achievements?

What are the biggest lessons you've learned?

GO DEEPER

What are your greatest strengths?

What are your greatest weaknesses?

GO OUTSIDE

What are the biggest opportunities available to you in 2024? (max. 3)

What are the biggest threats you may face? (max. 3)

STEP 3

SET YOUR GOALS

GOAL 1

What's that one thing your business will achieve the next 12 months?

GOAL 2

What's the second thing your business will achieve the next 12 months?

GOAL 2

What's that third thing your business will achieve the next 12 months?

STEP 4

IDENTIFY KPIs

How do you know you are achieving your goals

Instructions: Select 3 to 5 KPI for business goal. if you have story data, include it in the column benchmark

Key Performer Indicator	Benchmark	2025
GOAL 1:		
GOAL 2:		
GOAL 3:		

STEP 5

ACTION PLAN

Break down your goals and KPIs into specific, actionable steps.

Outline the tasks, timelines, resources, and who is responsible for achieving each goal.

This step ensures your plan is practical, focused, and ready to implement.



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KPIs

[illegible]

GOAL 2:



Target

KPIs

[illegible]

GOAL 3:



Target

KPIs

[illegible]

YOUR DASHBOARD

	2024	2025 TARGET	2025 ACTUAL
Revenue			
Gross Profit			
Net Profit			
GOAL 1:			
GOAL 2:			
GOAL 3:			

ADDITIONAL **RESOURCES**



HOW TO MEASURE SUCCESS

Key Performance Indicators (KPIs)

Key indicators help you measure whether you're on track to achieve your goals.

For example, if your business's purpose is to help people live longer, healthier, and happier lives through 6-month, 1-to-1 coaching and by promoting and selling nutritional products, your KPIs might include:

- Revenue
- Number of active customers
- Community membership growth

These metrics ensure you stay focused on what drives success in your business.

Here you will find the most common KPIs:

Financial:

- Revenue Growth
- Profit Margin
- Cash Flow
- Account Receivable Turnover
- Operating Expenses (OPEX)

Sales & Marketing:

- Number of customers
- Number of Leads
- Lead Conversion Rate
- Return of Investment

Customers

- Customer churn
- Net Promoter Score (NPS)
- Customer Acquisition Cost (CAC)
- Customer Lifetime Value (CLV)

Products

- Average Order Value (AOV)
- Upsell & Cross Sell Rates
- Daily Orders
- Cart Abandonment Rate

Operational:

- Inventory Turnover Ratio
- Days of Inventory Outstanding
- Return Rate
- Cost Per Order

Suppliers:

- On-Time Delivery Rate
- Order Accuracy
- Lead Time

MONTH OF _____

MONTHLY INCOME STATEMENT

INCOME

REVENUE SOURCE	
REVENUE SOURCE	
REVENUE SOURCE	
REVENUE SOURCE	
GROSS INCOME	

EXPENSES

EXPENSES	
COST OF GOODS SOLD	
GENERAL & ADMINISTRATIVE	
MARKETING & PROMOTIONS	
RENT	
TOTAL EXPENSES	

MONTHLY NET INCOME

GROSS INCOME	
TOTAL EXPENSES	
TAXES	
NET INCOME	

YEARLY INCOME

GROSS INCOME	
TOTAL EXPENSES	
TAXES	
NET INCOME	

NOTES

HERE YOU CAN WRITE YOUR NOTES.

OUR SERVICES

We understand that your business is unique, so solutions must be tailored to you and the challenges you face. We work on specific projects or long-term with you to improve your business's profit, growth, and overall value.

Our tailored services are designed to help businesses of all sizes achieve their goals.



Strategic Planning

Enhance your business with a tailored annual operating plan. We provide expert guidance to establish clear goals, supporting sustainable growth and long-term success.



Sales & Marketing

Boost your sales and marketing efforts with targeted strategies. We optimise your approach to attract more customers, increase revenue and support your sales team.



Business Growth

Unlock new opportunities with our comprehensive growth strategies. We help you increase market share, acquire new customers, and expand your business effectively.



Process optimisation

We streamline processes, improve productivity, and reduce costs to boost customer satisfaction and enhance overall business performance.



Mentoring & Coaching

Gain valuable insights with our mentoring and coaching services. We offer personalised support to develop your leadership skills and drive business success.



Fractional Executive Expertise

We lead your marketing and operations functions on a part-time basis, offering strategic insights and expertise without the costs of full-time commitment.

OUR TEAM



Andrew Walker

Originally from Dublin, I've lived and worked in the UK and The Netherlands for the last 35 years, before returning to Ireland.

I have 25+ years' experience working at a senior level in multi-channel, national and international companies across Europe.



Susana Marambio

Originally from Chile, I've lived and worked in Spain, The Netherlands and UK before moving to Ireland.

I have 20+ years' experience developing and implementing strategies to achieve commercial goals. Industries: technology, pharmaceutical, retail, packaging, service and business supplies.

Contact Us



+353 (21) 486 6664

hello@bbcs.ie

www.bbcs.ie