

A man with glasses and a brown sweater is smiling while looking at a document. A woman with curly hair and glasses, wearing a beige blazer, is also smiling and looking at the same document. They are sitting at a wooden table with various business charts, a notebook, and a tablet. The man is holding a pen over a document with a pie chart showing 50% and 25%. The woman is holding a pen over a notebook with a yellow sticky note. A tablet in the foreground shows a similar pie chart with 50% and 25%.

# Strategic Business Review



## Business... Is it a Grindstone or a Springboard?

Business can be the most effective vehicle to springboard you towards a life of freedom, fulfillment and wealth, or it can be the opposite – a burden that you feel trapped in and draining you of your energy and enjoyment.

We come across both situations, but by far the most common one is meeting business owners who just aren't achieving the rewards and outcomes that they should be for all of the effort, risk and sacrifices that they are putting into their businesses. And it doesn't need to be like that.

We all know businesses in every type of industry that are successful. So, it is not the business nor the industry sector that is the problem, but it is most likely the business owner. And this is through no fault of their own. They have found the motivation and energy to start a business, normally because they are good at the technical side of the business, but they have never been shown how to run or grow a successful business.

And this is why we, as Business Coaches, do what we do. We are here to help educate our clients, help them develop their business skills, guide them towards making the right decisions, and structure the business so that it can provide them with the rewards that they deserve. We are here to help you to turn your business into a Springboard – one that creates freedom, fulfillment and wealth for you and your family.





## The Starting Point

The starting point for you to transform your business into a wealth creation machine is a Strategic Business Review (SBR). This is where we start with all of our clients.

Before you jump in and start making changes, it is vital to understand what is happening in your business, what is working, what isn't and where you really want to be in (say) 3-5 years time. Only then will you be able to determine the right strategies to achieve better results with the minimum effort.

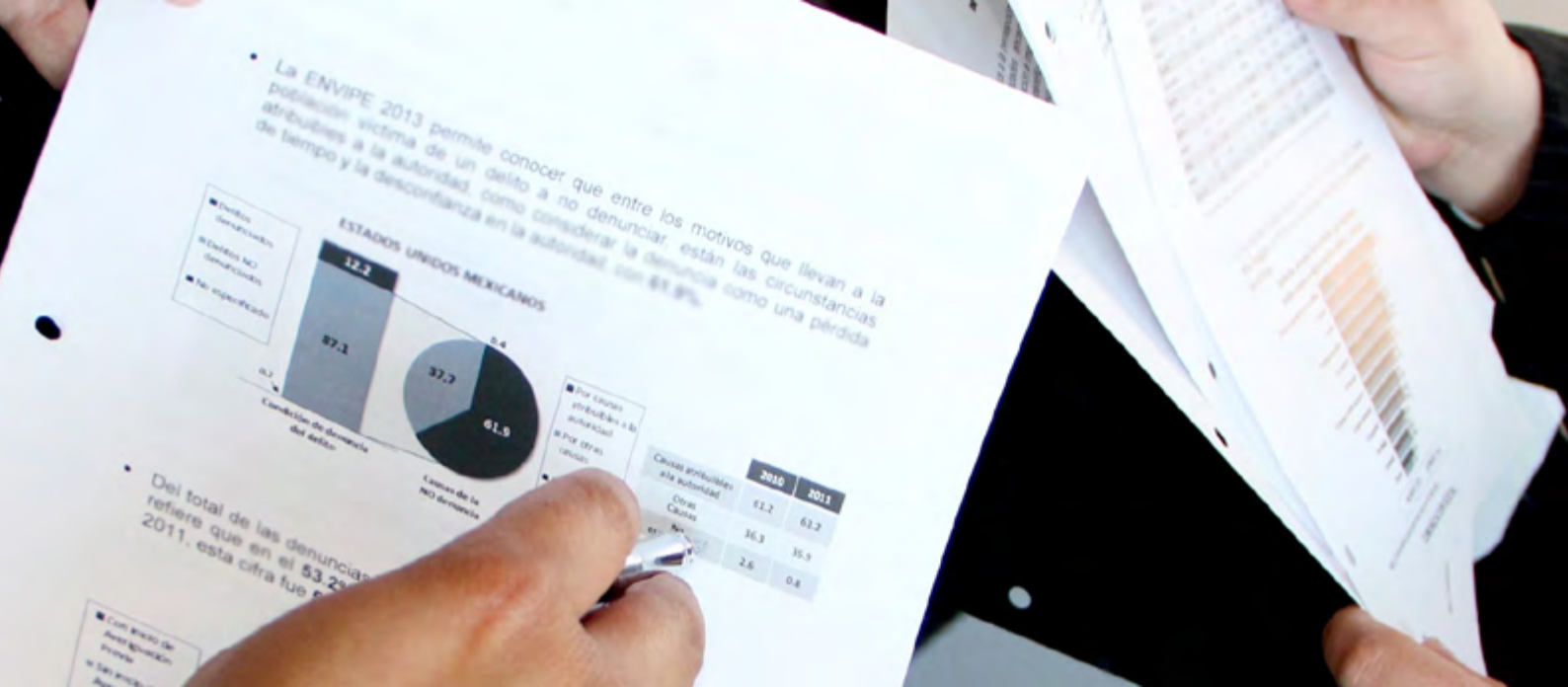
We have been helping businesses do this for over 15 years and we have developed effective tools, models and methodologies to help analyse your business, help you to get clear on where you want to go and then provide you with a roadmap to help you to get there.

So, if you are ready, let's get started...

### The SBR looks at key areas, including:

- Your financials, pricing and margins
- SWOT Analysis
- Competitors and the market
- Marketing and Sales process
- Team roles and responsibilities
- Systems and processes
- Team productivity
- Your Leadership
- Goals and Business Planning





## Our 4 Step Approach

Our Director of Business Coaching conducts all of our SBR's using the following 4 step approach.

### Step 1: Gather Information

We firstly get you and your senior managers to complete our Strategic Review Questionnaire. This will provide vital information from you and your team on how you all view the business:

- What is the long-term vision for the business
- The Strengths, Weaknesses, Opportunities and Threats
- Individual areas for improvement
- Shorter-term priorities and goals
- Assessment of your customers and competitors
- Roles, responsibilities and team structure

This information will provide the basis of the workshop in Step 3.

### Step 2: Financial Review and Analysis

People say that “the numbers don’t lie” and that is why it is important for us to conduct a review of your recent numbers and financial reports to get a proper understanding of the current and past business performance. This provides us with a better idea of your business model, your year-on-year trends and performance, seasonal trends, management of debtors and cashflow, and areas where we can improve your margins and profitability.





### **Step 3: Strategic Review and Planning Workshop**

This is where we sit down with you (and possibly your senior managers if relevant) to discuss the information gathered in steps 1 and 2. We explore the reasons for your questionnaire responses and what the financials and analysis of your numbers are telling us. We will also discuss your personal goals as part of this since your business should be working for YOU, not just the other way around.

The outcome from this workshop is a list of profit-improvement strategies, a written plan breaking down your goals and strategies into long-term areas and immediate projects, identification of

key activity numbers that you should be tracking in your business to ensure that you achieve the right results, plus a clearer understanding of the key roles in your business, what each person should be responsible for and how their performance should be measured.

### **Step 4: Review and Finalise Business Plan**

The final step is to present you with the meeting notes, recommendations and the plan for us to review and finalise. You now have a roadmap to propel your business forward and a plan that you can review and update each quarter as you reassess your goals and priorities.





## How To Book Your SBR

A Strategic Business Review is a comprehensive review of your business situation, future goals and a tailored assessment of the strategies needed for your specific business. This is all designed to create lasting improvements and help you to achieve your long-term goals.

As part of this review and planning process, we use highly-developed models and tools to help analyse your business and provide you with a practical plan that you can action and implement immediately. We are all about simplicity and action rather than getting bogged down in complex plans and detail.

However, each business is very different in terms of size, structure and the aims of its owners and that is why we have a range of SBR's to suit the needs and budgets of various businesses.





## Initial Step – Free Discovery Meeting

Because of the flexible nature of our Strategic Business Reviews, the varying needs of each business and our desire to recommend the most appropriate option, the first step that we take is to hold a free 30 minute Discovery Meeting with you. This is done over the phone and is entirely obligation-free and risk-free.

This will give us an overview of your business situation and goals and we will then be able to recommend the right option for you. However, there is also no obligation for you to do anything, and at a minimum you will leave with some ideas and improvements that you can implement in your business. We also know many experienced and cost-effective service providers that we work closely with and we are happy to connect you with them if they are better placed to serve your particular needs.

**So, get in touch either by email or phone. We are always happy to speak and help in whatever way we can.**



Anil Puri heads up our Business Coaching Division nationally and has over 30 years experience in business. Starting life as an accountant and gaining considerable business experience working in corporate accounting and commercial management roles, Anil was inspired to start his own consulting business because of his father who was a self-employed consultant and business owner.

Anil's father was a consultant doctor (orthopaedic surgeon), while Anil's choice of business has led him into the role of being a "business doctor". Using his accounting and business experience, and Masters of Management qualifications, Anil is passionate about helping to diagnose the ailments of a business and help the owners and managers to create a roadmap for improvement and success.

For over 15 years, Anil has run his own consulting and coaching business, working with the owners of small and medium sized businesses to help them to learn the skills and strategies it takes to build profitable, well-managed and successful businesses.

He has a wide range of experience but specifically helps his clients in areas such as:

1. Strategic Planning
2. Profit Analysis and Improvement
3. Leadership and Team Management
4. Business Systems and Productivity
5. Financial Management
6. Time Management and Accountability

Anil is also very active in his local business community and contributes his time in several voluntary positions. He is the Vice President of his local Chamber of Commerce, Treasurer of a large Western Sydney based disability service provider and his family regularly gives their time to support local charities and causes.





## CONTACT US

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