



Writing a Business Plan.

A Well Designed Business Plan is the Foundation of Any Success

By Bob Norton, Founder of AirTight Management

Business planning and strategy development are the most critical and complex processes in any organization because they involve all the business disciplines working together. These include: Marketing, Sales, Finance, Operations and Product/Service Development, Leadership and Management.

Skimping on your Business Plan is like installing a substandard foundation in a building

When is a Business Plan Needed?

It is typically necessary to develop a business plan if you meet one or more of the following criteria:

- Want to raise equity capital
- Want to get bank loans
- You have 7+ employees
- Business is not just a simple service, renting people's time by the hour like legal and accounting
- You want to build a valuable business with sustainable competitive advantage that can be sold in the future
- The business is complex due to many products, services or markets

Every business should have a business plan. Any business that does not is probably a "job", not a business. Businesses coordinate the efforts of many people and the business plan is the key document that aligns teams and sets goals.

Definitions

Business Plan – A document with 1-3 years of plans for each area of the business to be successful in delivering value to a target market.

Strategic Plan – A Long-term plan that identifies the opportunity, problem and competitive landscape, as it is expected to evolve over time. It takes advantage of a market need, gap, shift or enabling technology. A good business creates much higher value than the cost to produce it by assembling resources to generate a profit.

Executive Summary – A 2-3 page document describing the business and its plans and "selling" why it will do well and/or be a good investment. An ES is designed to be the "bait" for investors, key employees and even vendors.

Slide Deck, or "Dog and Pony Show" – A presentation to walk anyone through the business strategy and why it will succeed.

Writing a Business Plan, or Strategic Plan, they are both inseparable with lots of overlap. This is not a job for a writer. It is a job for a highly experienced business person



Steps to Develop a Quality Plan:

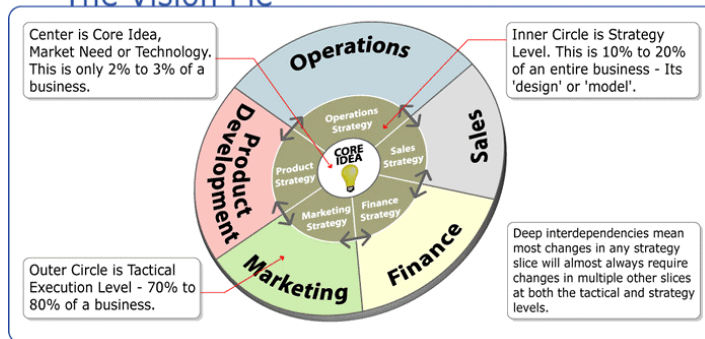
- Collect market research –Often 25-33% of the effort when combined with some Competitive Intelligence work every business needs regularly
- Design an ideal customer profile with demographics, psychographics and other criteria to identify the best target niche. All companies need niches, even General Motors niche markets every car).
- Design your product, service or hybrid product and service offering.
- Determine the staff needed to execute the plan well and help in the collaborative process of strategy. The team is everything and will determine success. Investors will not invest without a good team. This does not mean you have to have them all hired but identifying them will make you a more serious player.
- Design a preliminary business model, this includes product definition, pricing, marketing and distribution strategy, delivery method(s), value proposition, USP and other elements
- Create an Executive Summary or slide deck to present this to others and get feedback
- Test 7P's against the ideal customer (market testing)
- Go to market strategy (Lean, MVP test)
- Create the final Strategic or Business Plan
- Develop a financial model, not just a budget, but ideally a "Simulator" of the business that allows you to run instant "What if" scenarios and update as needed

Call (619) SCALE06 for a free assessment of your needs and a quote to develop exactly what you need today.

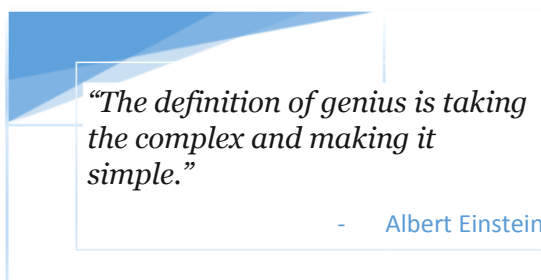
and entrepreneur. Or for a team with expertise in several areas. Writing is the easy part. Expertise must include:

- Domain expertise** - Whatever technical or industry experience is needed to deliver the product or service
- Marketing Expertise** – How will you target, attract, qualify and nurture leads of the best potential customers?
- Sales Expertise** – How will you close deals?
- Operations** – Customer service and related delivery experience with people and logistical skills
- Finance** – Developing a financial projection and/or budget is needed for any significant business opportunity, even if you do not need to raise capital.
- Management & Leadership** – Those skills needed to identify talent, attract it and inspire and manage people effectively to generate value.

The Vision Pie



Click [here](#) for a short video on business model design concepts used to create a world-class business plan and strategy for you. All our services include a library of videos that educate and align people and language, as well as make the process more cost effective.



Full Business Planning Process Deliverable List

- Executive Summary** – A two page summary of the business that is the “Bait” to attract investors, key employees and even get better vendors and partnerships.
- Slide Deck** – Twenty key slides to show investors plus 20 more to address deeper questions and show you have done your homework if needed.
- Business Plan** – A 20-40 page document covering all the strategic level issues of the business. Typically it will include a high level Sales and Marketing plan, financial projections for 3-5 years and supporting data that validates your business.
- Strategic Plan** – This is often best done in slides so it is easy to update. However if you have the resources, or the business involves more than 50 people, it is better to develop a full written document.

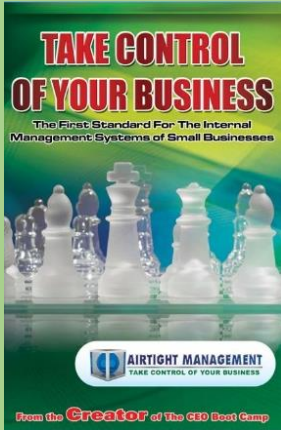


Business planning should be a collaborative process that involves people with several key disciplines. It is an opportunity to grow the strategic level thinking of the team, align them and involve them in key ideas.

Becoming Profitable and/or a Market Leader in Your Space Requires Sustainable Competitive Advantage – Few People Know how to “Design” this into a Business.

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Our Proprietary Planning Process is Guarantees Results



Our process incorporates over two decades of experience in developing business plans. We created the AirTight Management Strategic Planning Kit to facilitate this process. It has over 200 files. You will not use all of these but the ones you do use will need to be carefully selected by a business planning expert who we certify only after many years' experience and training in our system.

Training – Each business plan we do includes access to our Video Training Library (VLT) with over 150 videos. This will save time, align people and language and introduce advanced techniques used by top management consulting firms that would charge five to ten times as much as our boutique consultancy would to develop a plan for you. There are twelve key tools and over 100 models, forms, sample templates and other files that will speed the process and improve quality.

Consulting & Design – The design of a plan for your company and team requires vast experience. Strategic Plans and customization is an art, not a skill, which requires decades to develop. Our experts will get it right for you the first time instead of you doing trial and error for months or years. We will also bring outside perspective as well as viewpoints and ideas from many other industries

Coaching – In some Strategic and Business Planning processes we will take the full responsibility to coach your senior staff up in their thinking. For a company to grow you must develop the senior managers.



AirTight™ Management is the first ever comprehensive framework for all the Management Systems a small to medium size business (“SMB” from 15 to 999 employees) needs to run and grow their company. It incorporates over 1,000 management and leadership best practices. Used properly it will turn any company into a market leader in its space over time.



Expert Business Coach & Consultant

- CEO since 1989, Coach and Consultant since 2002
- Trained thousands of CEOs on 6 continents in Best Practices via his CEO Boot Camp, AirTight Management seminars and many other programs
- Has helped hundreds of companies double and triple their growth rate and profits
- Leading authority, author and speaker on Leadership, Management and Management Systems
- Grown two companies to over \$100 million in sales from start-up, creating over \$1 billion in shareholder value
- Founder and/or CEO of six startup companies

**By Bob Norton
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Call: **(619) SCALE06** for a free business assessment.

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[Dashboards and Metrics to Drive Higher Performance](#) [Strategic Budgeting](#)
[Process Management Human Capital Acquisition and Development \(HCAD\)](#)



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Testimonials

We have a perfect 5-Star score at both third party consulting sites where we offer coaching and consulting services.
So you know you will be happy with our work.

You can also read 3rd party testimonial on Bob's LinkedIn profile here: www.linkedin.com/in/robertjnorton

Here are a few examples from satisfied clients who are also very successful entrepreneurs and CEOs:



Craig Valentine Brenner

Vice President of IT and SaaS at Invaluable

“ Bob Norton is an amazing person. He has an un-definable sixth-sense about business and it's many moving parts. His passions include mentoring and instruction. Business leaders who spends time with Bob Norton often have an "AHA!" idea that could fundamentally improve the business. Bob is easy to talk to and is a down-to-earth conversationalist. I highly recommend Bob and... more ”



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Craig has run one technology company as its CEO and helped Kiva Systems, a robotics company, be acquired by Amazon.com for hundreds of millions after working with Bob to design its dashboards.



David Dill

CEO at Wellesley Pharmaceuticals

“ I have known Bob for about 15 years. He is a very bright, creative, and experienced executive. His combination of big company and entrepreneurial experiences in good times and bad have given him an excellent platform for advising others. As a man of integrity and perceptive insights, Bob can always be relied upon to steer you in the right direction. ”

4 “We were able to improve our management of the business and see things we never saw before as a result of AirTight's help. I recommend it to any business that wants to grow.”

■ CEO of \$4MM B2B Service Company

3 David is an ex-IBM Executive turned CEO.

4 Bob has even been mentioned in the same paragraph as Richard Branson and Tony Robbins in a book acknowledgement by a CEO and author client here:

To all of the many clients that I have dealt with for the past seventeen years. Thank you for believing and trusting in my company and myself.

I have also been privileged to be touched by people who have had influence in my thinking and behaviour over the years. To Richard Branson for his inspiration and motivation of what is possible. To Anthony Robbins who helped me take the first step in understanding about human neural linguistic and associated communications and inspiring the leader qualities within me. To Bob Norton who inspired my business thinking in different tangents.

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Feedback to Freelancer



Bob has a wealth of information and practical experience in building and growing companies. Whether you're a new entrepreneur or an established company, Bob will bring valuable lessons and tools to the table to solve whatever problem you might be facing. My experience with him was stellar. He was able to quickly identify my problem and he immediately provided a detailed map on how to solve the issue. Bob does not hold back information, or tag-you along to make more money. He sees the problem and provides an immediate practical remedy. He also has self-designed systems that add value to your company and prepare it to be a market leader. If you are eager and hungry to learn and grow from a proven CEO, coach, and consultant then Bob is your guy. I have been on Odesk for a while and they are very few experts with the type of experience, knowledge and skills Bob possess.

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Compelling Executive Summaries for VCs



Client: Mountainrays (13 other reviews completed)

Apr 7, 2015 | \$2,000 | Management Consulting | Completed | [Job Details](#)

We are an early stage SaaS startup. We are looking to raise our Series A round from a Tier 1 or 2 VC. Looking to craft a compelling two pager executive summary. We have a very good story to tell, just need someone to pull it together to make it compelling.

Skills: business planning, business analysis, executive summary, vc funding, financial projections

Feedback Comments:

“Very nicely done! I very much enjoyed working with Bob! Will definitely do business with Bob again.”
— Client

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Feedback to Freelancer



Bob is extremely knowledgeable in all matters one needs to start, manage and execute a business, including life balance. He is an excellent coach. Aside from strategy and tactics, I was very impressed by the variety of sectors which he understood the ins and outs of which was just an added value of working with him. I was a little reluctant at first, but it was worth every cent. I highly recommend Bob as a business advisor and coach.

We will be happy to provide appropriate references with similar work and stage of company on request.

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