

## Business Planning Services



### Done-For-You

The “**Done-For-You**” option for working with a certified **LIFTOFF Business Plans Coach** is a more expensive approach that puts you in the driver’s seat of the scope and timing of what you want to work on. The objective is for the coach to customize your business plan if required, and to make sure that the reference plan is ready for you to work with. This reference plan is held constant, so that when you work on different scenarios (or ask the coach to do that) you first take a copy of that reference plan that you then modify to represent the unique aspects of that unique scenario.

The “**Done-For-You**” option is completely confidential, your information is never shared with anyone unless you do so yourself (talking to financiers and/or investors, for example). There is usually a limit on the number of private clients a certified **LIFTOFF Business Plans Coach** can work with at any given time, and you will want to know more about the coach’s style, so it makes sense to first attend at least part of a “**Done-With-You**” webinars series to become familiar with how the coach presents the information before you contract them for a private engagement.

The “**Done-For-You**” engagement is usually broken into intermediate milestones to represent individual bundles of pre-paid work, so the client remains in control of when successive goals are achieved. The coach will share their availability schedule and confer with the client on when they want to achieve each individual goal. For example, creating a reference plan based on the existing operations may be the initial goal, so that we can use that to compare against future goals that reflect alternative implementation scenarios. We can also help plan the transition from where you are to where you want to be, either within a single implementation plan, or by establishing intermediate goals (which can be critical to achieve a business transformation while trying to retain an existing customer base).

Each client engagement is a unique endeavor, which requires prior discussion to understand the scope and objectives before cost estimates can be produced. This also depends on whether the engagement uses the standard business plan template (usually with minor adaptations to reflect the client business) or if a significant customization is required (such as for consolidating business plans across a distributed planning hierarchy).

The goal is to complete the **business plan reference** model that clients can copy and tweak to reflect the particulars of alternative scenarios they can analyze themselves if they prefer. It is easy to create alternative versions by copying an Excel™ worksheet into a new worksheet and assigning that a name that represents a specific scenario. Clients may want to retain the certified **LIFTOFF Business Plans Coach** as an accountability partner to keep them on track to explore those alternative scenarios and to provide suggestions on how to get better results. Keep in mind that coaches are not business advisors: whatever scenarios you explore and use as the target implementation should always be subjected to a review by your licensed advisors (accountant, lawyer, engineer, realtor, etc.) before you seek financing for your business.

