



# ANZAN STRATEGIC PLANNING WORKSHOP PACKAGE

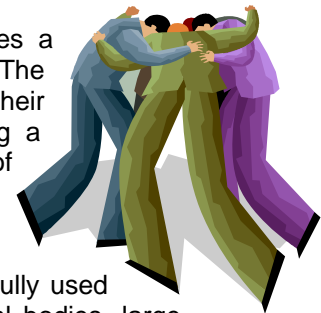


**LEARN OUR "POTS & PANS" PROCESS. TURN A PLAIN ORDINARY TAX SERVICE INTO A PRETTY AWESOME NEW SERVICE**

An accounting practice is a business process - A successful practice is a good business process.

If you don't recognise the processes operating in your business how can you change the outcomes? Anzan Professionals can assist you to distill the essentials from complexity.

Traditional business planning is hard to sustain. Our process provides a practical set of procedures and tools that are easy to implement. The workshop is designed to enable attendees to develop a strategy for their organisation and then implement that strategy. In addition to building a Business Plan for your own practice you will learn the building blocks of how to initiate a strategic planning process in your business in this practical, interactive workshop.



The Planning and Developing Your Business Manual has been successfully used with a wide range of organisations from community groups, professional bodies, large international companies and small and medium enterprises.

The business improvement processes used can be applied by anyone, but there is no substitute for experience. David Connell FCA, FCPA(Bas), an accredited facilitator and with over 40 years experience in the profession, will take you through the tools and processes to assist you develop plans for your business.

We emphasize that this is a very quick process aimed at focusing on the important issues as quickly as possible. Afterwards we would recommend that you consider the possibility of utilizing the resources available to you for direct assistance in implementing specific action plans such as systems implementation, HR matters, succession and so on. The use of an outside facilitator also enables sensitive issues to be raised that might otherwise be ignored.

Contact us for details of your total investment including the preliminary diagnostic work, the two days of actual workshop, travel time and subsequent reports including 'bullet point' business plan and one-page plan. ***You should expect to return many times this in improvements on your bottom line and we are able to provide testimonials to that effect.***

David avoids telling you what to do – rather he facilitates solutions with you – but his many years of experience as a practitioner and facilitator with many hundreds of professional firms enables him to bring to the table ideas and a knowledge of what is happening in our profession that would not normally be available to a firm in isolation. Our emphasis is very much upon practical implementation not 'whiz bang, magic bullet' systems that usually do not work. David Connell has 40 years experience in the accounting profession (including 17 years as a partner in Coopers & Lybrand in regional centres and about five years as a partner in two second-tier firms).

We very much look forward to working with you to add value to your practice. Please do not hesitate to contact us for further information.

SERVICE	DETAILS
1. <b>Preliminary Diagnostics</b>	Involves completion by the firm of data input for subsequent calculation by Anzan of key KPIs, production of 'traffic light' reports, comparison report and a Word report containing generic strategies for highlighted 'red light' areas in the KPIs; provision of a Practice Needs Analysis, and Firm Review diagnostic.
2. <b>Workbooks</b>	<b><i>Provision of a 32-page workbook for each participant in the workshop. This has the very substantial added advantage of effectively providing a process that the firm itself can use in rolling out its own service in strategic planning for clients and thereby generating a new revenue stream for the firm</i></b>
3. <b>Agenda</b>	The workbook follows an agenda over two days of intensive brainstorming and analysis using a proven process.
4. <b>A SWOT</b>	A detailed analysis of the firm's strengths, weaknesses, opportunities and threats with reference to the accumulated experience of dealing with many hundreds of accounting firms.
5. <b>Issues for your Practice – identify them</b>	All too often firms list issues that are effectively internal operational issues only – this workshop will draw out strategic issues utilising the experience of David Connell who has worked with many hundreds of firms.
6. <b>Vision</b>	What is it your firm is trying to achieve? What is your vision in 3 years, 5 years ....
7. <b>Your Business Statement</b>	What business are you actually in.... POTS & PANS (see balloon above)?
8. <b>SCA</b>	Determine your sustainable competitive advantage or winning edge. What is that you have or can have that other firms do not?
9. <b>Goals</b>	List specific goals and objectives and set timelines.
10. <b>Rank Issues</b>	Rank issues in order of importance.
11. <b>Action Plans</b>	Commence the process with the aim of completing in great detail at least one or two specific plans in order of priority – using tools such as Forcefield Analysis, MindMaps, Strategic SWOTS.
12. <b>Tools</b>	The process includes use of these tools (above) and these can then be used in a variety of ways with clients for consulting exercises. Templates provided.
13. <b>Bullet Point Business Plan</b>	Subsequent completion of a 'bullet point' business plan/report arising from the workshop – approximately 30 pages – in Word format to enable subsequent changes as adynamic document.
14. <b>A One-Page Plan</b>	A one page summary of the business plan for quick reference.
15. <b>Travel</b>	David is prepared to travel to and from your office anywhere in Australia or New Zealand. Travel time is included.

## REQUEST FOR SERVICES

	Yes	No
Strategic Planning Workshop as above		
Business Development Seminars		
Other services:		
Benchmark report actual		
Benchmark report budget		
Inclusion in ANZAN TOP 500 list		
Send more information relation to the template/ formatting service, BAS reports, etc		
Practice Improvement networks		
Anzan Mentor		
Consulting Services		

Fax this form to us today at 02 6971 7320, or email [anzan@anzan.com.au](mailto:anzan@anzan.com.au)  
or phone 02 69 717 314

<b>Name of Firm</b>	<b>No of Partners in firm:</b>
<b>Address:</b>	
	<b>Postcode</b>
<b>Tel:</b>	<b>Fax:</b>
<b>Email:</b>	<b>Web:</b>

Name of authorised signatory: \_\_\_\_\_

Position of authorised signatory: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



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