



Planning for Profits

How to Develop & EXECUTE an Effective Business Plan

- *Evolving from Vision to Strategy to EXECUTION*
- *Driving Organizational Growth and Performance*
- *How to Gain a Strategic Competitive Advantage*

Business Planning is a process by which an organization envisions its future and develops the required plans and procedures to accomplish that vision. Developing this unified sense of direction is essential for success, yet for most organizations it is frequently overlooked. This seminar strongly focuses on EXECUTION and implementation of the business plan — too many excellent plans are never achieved.

Envisioning is more than anticipating the future - it is a process through which the organization can “change” its future. A critical leadership skill is the ability to develop and EXECUTE an organization's business plan.

Seminar's Primary Focus:

- **Financial Leadership** — how the CPA/Financial Leader effectively leads the Business Planning process. This critical leadership skill is the ability to coordinate this unified sense of direction, yet for most organizations it is frequently overlooked.
- **Strategic Thinking** — this first step is a determination of the direction the organization has decided to pursue. It is highly intuitive in nature and addresses the organization's Values, Mission and Strategy.
- **Strategic Planning** — a dynamic process of deciding what products and/or services to provide and which markets to develop. A proven method to insure the selection of the right strategic objectives.
- **Operations Planning** — essentially the EXECUTION and implementation of the Strategic Plan. Identifying specific results to be achieved within a given period and the actions and resources necessary to achieve these results. Using Project Management can be used as a tool for successful EXECUTION.
- **Financial Planning** — describing in financial terms the organization's projected performance. The tactics developed during the development of the operations plan will drive the development of the financial plan — these two plans are solidly linked.

What Will Be Learned:

- How the CPA/Financial Leader can effectively lead the Business Planning process. Step-by-step procedure.
- How to identify key results areas and analyze critical issues.
- What comprises the four major processes of Strategic Thinking, Strategic Planning, Operations Planning, and Financial Planning.
- How to use Project Management as a tool for EXECUTION of the plan.
- Using Business Process Management to link Strategies, Operations, and Financial Planning.

Who Should Attend:

CPAs directly or indirectly involved with their organization's Business Planning, Financial Analysis, and Financial Reporting. This seminar is particularly beneficial for the CPA who has recently moved from Public Accounting to a position in Industry.

CPAs in Public Accounting who want to enhance their ability to help their clients improve profitability.

Seminar Materials:

Each participant will receive a large Business Planning workbook, that will be used during the seminar and serve as a valuable take-home reference. The workbook includes many forms, schedules, and checklists (both financial and non-financial) that can be used immediately to enhance the planning process.

Seminar Length:

Half-day and Full-day - lecture, highly-interactive, small group discussions, exercises and case studies, opportunities for participants' questions.

CPE Credit: 4 hours and 8 hours.

Level of Knowledge: Basic.

Prerequisite: None.

Advance Preparation: None.

About Your Seminar Developer/Presenter:

Jack Park is a highly effective developer and presenter of Business Planning seminars. He currently facilitates the strategic planning process for many clients. Park founded Financial Insights, a consulting and leadership development firm, after serving 22 years with four major corporations. He consults with organizations in the areas of Business Planning, Leadership Development, Profitability Analysis, and Cost Accounting.

Park has presented programs nationwide for 45 different State CPA Societies, Associations, Institutes and numerous Corporations. His corporate clients include Microsoft, BMW, Edward Jones, Home Depot, Nationwide Insurance, and Merrill Lynch. He serves as a Leader-In Residence instructor at the Franklin University Leadership Center. His knowledge and presentation skills ratings are consistently among the highest of all instructors

Park holds the National Speakers Association's Certified Speaking Professional (CSP) designation. The CSP, established in 1980, is the speaking industry's international measure of professional platform skill. Fewer than seven percent of NSA's 3,000 members hold this professional designation. He also received the Member of the Year Award from NSA's Ohio Chapter. Park earned his M.B.A. at The University of Pittsburgh and his B.S. from The Ohio State University.

Seminar Outline

The CPA/Financial Leader as Business Planning Facilitator

- Gaining Commitment and Cooperation
- Timing and Creating the Proper Atmosphere
- Linking through Business Process Management
- Using Project Management for EXECUTION of the Plan

Strategic Thinking - Define the Desired Outcome

- Vision
- Mission
- Core Values

Strategic Planning

- Identify Key Results Areas
- Analyze Critical Issues
- Interior Analysis, Exterior Analysis, SWOT Analysis
- Selection of Strategic Objectives
- The Z Model for Driving Growth
- Development of Action Plans

Operations Planning

- The Five-Step Action Plan
- People Development
- The Five Competitive Forces
- Tactical Alternatives

Financial Planning

- Market Plan and Sales Forecast
- Capital Budgets and Financial Projections
- Pro-Forma Financial Statements
- Package, Present, and Distribute
- Establish Plan Review Dates

EXECUTION and Implementation of the Business Plan

Financial Insights – Jack Park, MBA, CPA, CSP

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