

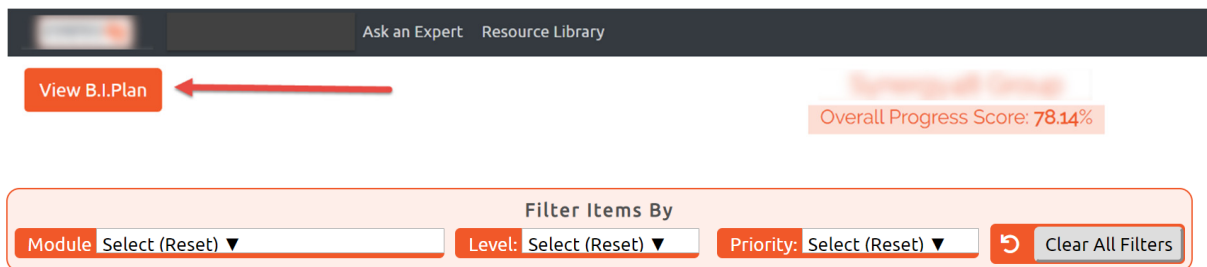
THE BIPLAN SYSTEM ACTION PLANNING AND PRIORITISING PROCESS

Here's a suggested process to help you prioritise all of the NOT DONE items in your Business Improvement Planner.

*Any **advice** and information in this process is general only, and has been prepared without taking into account your particular circumstances and needs. Before acting on any **advice** in this process you should assess or seek **advice** on whether it is appropriate for your needs, **financial** situation and business objectives.*

START HERE

1. Click the link to your BIPlan page from the top left corner of your Dashboard



1. **Sort by priority** to bring all of your NOT DONE items to the top of the screen (see screen capture above)
2. If you have a LOT of undone items then you may want to **filter by level** to reduce the quantity (See Note 1 on the next page). You can either do this across ALL modules or only for selected modules. It's up to you.
3. Next **filter by Module** (E.g. branding and marketing)
4. Prioritise all of the not done items with * or ** at the start as ADD TO PLAN (See note 2 below)
5. For anything which is simply NOT RELEVANT to your business – mark it with the priority NOT RELEVANT
6. For anything which requires expert input or which you simply don't understand - mark it with the priority NEED ADVICE (See note 3 below)
7. Make everything which is left as THIS YEAR or NOT IMPORTANT if you don't need to deal with it for the next 12 months
8. Repeat steps 4 – 7 above for all of the remaining modules (Customer Relationships, Financial Management etc.)
9. When you have completed steps 4 to 7 for all modules then CLEAR ALL FILTERS
10. Select Priority THIS YEAR
11. Re-Prioritise all of the THIS YEAR items based on their importance to your business goals. Again you may find the levels useful in allocating priorities (Refer Note 1)
 - Quick fix- is for anything which can be done if just a few minutes
 - Next 30 days is for your top priority items – we recommend no more than 1 or 2

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- Next 90 days is for all of the things you want to get done in the next 90 days. The most important of these items will move up into your 30 day list each month.
- This year – is for all of the things you want to get done over the next 12 months
- Not important is for things which you have decided can be left off your plan for the next 12 months.

12. Select NEED ADVICE and review the things you need to get help with. Pick the most important item and take action on it. (Again you may find the levels useful here depending on how many items you have.)

13. RINSE AND REPEAT:

- Every month we'll send you an email reminding you of what is on your 30 and 90 day lists and what you said needed to get advice on.
- Set aside 30 minutes to an hour every month to mark off what you've achieved and review your priorities for the coming month.
- Reset your 30 and 90 day goals and select your top priority NEED ADVICE Item or items
- Running out of things to do? If you have been using levels as a filter now is a great time to review the next level and start adding new action items to your plan.

Remember Business Improvement is a journey not a race... typically it takes between 3 to 5 years to complete all of the items in the BIPlan system depending on your business and where you are at in your business journey. Prioritise for success, enjoy the journey and celebrate the milestones along the way.

NOTES:

NOTE 1 – Levels

The Levels are an indicator only, however typically they relate to the following stages in your business journey.

- Level 1 = Profitable – the basics needed by every business to survive and be profitable
- Level 2 = Sustainable – the extra things you need to add to build a business that works without you
- Level 3 = Saleable – those things which will help you compete in a highly competitive market, grow nationally or internationally and maximize the value of your business for sale.

NOTE 2 – Add to Plan

You will see a * or ** at the start of many of the items. All of these items refer to a recurring activity

* is for items which need to be revisited at least once a year

** for items which need to be revisited every month.

To tick them off your business improvement plan you need to have a process in place to make sure that they happen consistently. To help with that we've created a monthly and yearly checklist which you can

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use. You'll find it on the Tours and FAQ page and we'll also send it you to you every month with your monthly BIPlan planning update.

NOTE 3: NEED ADVICE

Typically you'll find 2 different sorts of items fall into the NEED ADVICE category

1. Those which require professional expertise: E.g. "We have registered trade marks to protect our brand and any significant products developed by our business." If you already have a reliable, quality specialist in your network that's great, if not you can consult the Ask an Expert Directory to find someone who can help.
2. Those which you don't know how to do or even simply don't understand. Again if you already have a reliable quality specialist to ask – that's great. If not... we suggest a TWO step process
 - I. Every Checklist has its own Checklist Guide in the Resource Library, so look at that first.
 - II. Still need more help? Book a 15 minute help call with one of our specialists - you'll find a list of specialists who can help at the bottom of each Checklist Guide.

You'll find the Ask an Expert and Resource Library links in the top menu bar of your BIPlan Dashboard



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