



The world is always changing and as long as you're in business, the reality is you're going to have to keep adjusting and fine tuning your plans, acknowledging that some things will work and some won't. It is critical as a business owner that you are able to navigate disruptions and make the necessary adjustments (in a timely manner) to ensure profitability and implement sustainable business practices.

The Strategic Business Review gives you professional advisers as part of your team to help review, grow and develop your business and ensure that you, as a business owner, are working on your business and not stuck working in your business.

This review addresses the key aspects of good business management and planning that should be implemented by all those looking to own and run a genuine, successful business.

The purpose of this program is to provide a pathway via a constructive review, and proactive ideas, on:

- How to address your immediate issues
- Financial management
- Operational Business Strategies
- Business Planning and/or governance arrangements
- Getting you back on track for those who might be experiencing struggles, setbacks or difficulty.

We work with many businesses on a day to day basis which allows us to observe and understand what makes one business successful and what holds others back from greater success. We would love to bring to you the benefit of our experience by working closely with you and your business.



# STRATEGIC BUSINESS REVIEW

## BOOK IN A CALL NOW!

We only have limited places at any point in time for our strategic business reviews. If you would like to discuss this further, please make a time for an introductory call.

**BOOK NOW**



## Identify – Where are you at currently

We conduct a comprehensive review of where you are currently at, and what the pressing issues are. During this process (what we call the business basics) we will also uncover other areas that should be addressed.

- Bookkeeping and reporting
- Compliance obligations
- Tax obligations
- Cashflow and budgets
- Debt Management
- Profitability
- Key Indicators of underperforming businesses
- Resourcing and technology

## Protect

We address the immediate issues that are putting your business at risk. From cashflow issues right through to bigger picture strategic analysis and business planning, we provide strategic advice to navigate your way through.

- a) Risk Minimisation
- b) Urgent Issues

## Growth, Profit, Value

Our business review report will provide our recommendations and a plan on how to address all of the issues and opportunities identified.

- Quick Wins
- Strategic Planning and advice
- Financial systems and processes
- Financial Reporting
- Corporate Governance

Existing business owners may consider this as an opportunity for reflection, a gateway to successfully develop, and/or in some cases, re-design their business. The purpose of this program is to enlighten business owners,

be the catalyst for change to take their business to the next level, or provide constructive ideas and structure on how to get a business back on track for those who might be experiencing struggles, setbacks or difficulty.

A genuine business has a real market value and is not just solely revolving around an individual owner and operator. It needs to be systemised and well-structured towards growth and development. Running a business requires a person to be disciplined enough to step out of the role of employee by implementing policies, procedures and systems and to provide the leadership, vision and strategic direction of the business. How to be effective takes knowledge, support and an understanding of the various facets of a good business plan.

**The Business Review Process involves the following four steps:**

- 1** Initial questionnaires and data gather so that we can review your current position, goals and priorities in specific functional areas.
- 2** Business improvement planning session during which we are able to help you clarify your personal goals, your business vision and what your role should be within the business. At this half day session we're able to start defining key initiatives to assist you in achieving your objectives.

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3

Follow up meeting where we discuss your business improvement plan and together we plan the key initiatives defining scope, value, timeline and potential impact.

4

Implementation of recommendations including accountability, measuring key metrics to ensure our strategies are helping us achieve your objectives, as well as on-going review and monitoring.

Generally this will revolve around 4 areas:

1. Identify Value

- Business Basics
- Value drivers
- Value expectation gap
- Key Indicators of an underperforming business

3. Growth, Profit, Value

- Increasing the potential sale price
- Exit options
- Strategic planning
- Quick Wins
- Capacity planning
- Financial Reporting
- System and Procedure
- Marketing and Sales
- Corporate Governance
- Key people
- Management Succession

2. Protect Value

- Asset protection
- Creating wealth outside the business
- Succession Planning
- Risk Minimisation

4. Extract Value

- Exiting
- Tax
- Strategy
- Documentation



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