

Business Maturity Plan – Business Goals

Business Maturity Date.....

Desired Net Profit

Annual Sales.....

Monthly Sales.....

of Jobs per Month.....

of Leads per Month.....

My (Our) Role(s) in the Finished Business

Holidays/Time Off:

End Game (Sell, Keep, Succession Plan)

What do I need to do/become?

1)

2)

3)

4)

5)

Set Sales Targets

Your Desired Profit:

Fixed Costs (Incl. Owners Salary):

Required Gross Profit (Desired Net Profit plus Fixed Costs):

Target Gross Margin

Required Annual Sales (Required Gross Profit ÷ Target Gross Margin)

Required Monthly Sales (Required Annual Sales ÷ 12 Months)

Calculate # Of Jobs

Enter Average Sale

Divide Monthly Sales by Average Sale (Jobs Needed Per Month)

Determine Marketing Needs

Your Conversion Rate

Required No. of Leads (No. of Jobs ÷ Conversion Rate %)

No. of Tradespeople / Techs / Apprentices

Divide monthly turnover by monthly revenue per tradesperson (approx. \$25,000). Split between tradespeople and apprentices.

No. of Supervisors (e.g. Operations Manager, Project Manager, Foreman)

Divide # of tradesmen and apprentices by 7

Office Staff (e.g. General Manager, Office Manager, Estimator, Accounts Assistant,

Receptionist, Marketing Coordinator etc.)

Divide # of people on the tools by 4