

## **The Strategy Audit**

*A comprehensive review of your  
small business to enhance performance.*

### **The Approach**

- **Framing Session:** We sit down together and talk about your business and future goals, using questions provided to you in advance to structure our conversation. I provide you with a request list of key documentation and materials to aid the review.
- **Strategic Review:** I review & analyze your financial statements, business plans, tax returns, significant contracts, growth strategies and other key information to evaluate operating performance, risks, challenges & opportunities.
- **Recommendations:** You receive an executive summary-style report with detailed recommendations, which we discuss, review & refine together.
- **Goal Setting:** We formally set strategic goals and establish initial plans to execute recommendations.

*The Strategy Audit is based on a fixed fee plus optional ongoing coaching, in which we continue with periodic sessions to ensure you stay on track to achieve the goals we have established for your business.*