





# BUSINESS PLANNING: Setting Yourself Up for Success

Jenn Bogwald, CPA, CA May 30, 2019





# Plan Your Way to Success





## **VISION**

### **CUSTOMERS**

- Get 'em
- Keep 'em
- The right ones

### **OPERATIONS**

- Do lots
- Do it right
- Do it on time

### **PEOPLE**

- Willing
- Able

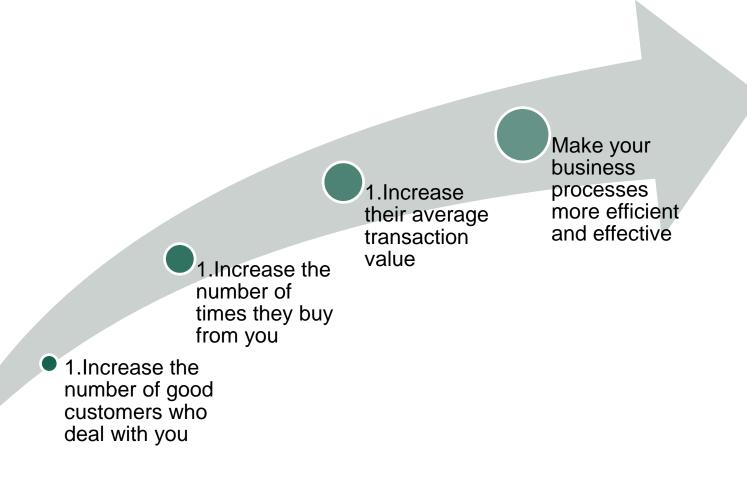
### (\$)FINANCE

- Profitability
- Cash Flow
- ROI

**EXIT** 



# The Four Ways to Grow Your Business





# **The Profit Equation**

# Customers x Frequency x Average Sale x Efficiency



## **MNP Private Enterprise Services**

From start up to succession, our professionals provide clear, straightforward advice to help improve every aspect of your business.

#### **BUSINESS MANAGEMENT**

- Accounting and compliance tax
- Cash flow management
- Structuring deals (joint ventures and partnerships)
- Investment analysis
- Profit improvement
- Bookkeeping and system design
- Strategic planning
- Economic impact assessments

### **PURCHASE AND SALE OF BUSINESSES**

- Due diligence for business acquisitions
- Business valuations
- Financing options
- · Packaging and selling your company

#### **RISK MANAGEMENT**

- Internal Controls
- Fraud prevention and investigations
- Cybersecurity

#### SUCCESSION PLANNING

- ExitSmart Program
- Retirement and Estate Planning

#### SPECIALTY TAX

- Corporate re-organizations
- U.S. tax planning and compliance
- GST / PST / Indirect Tax
- Scientific Research & Experimental Development Tax Credits

#### **HUMAN RESOURCES**

- · Recruiting key managers
- Compensation reviews and retention strategies

#### **TECHNOLOGY CONSULTING**

- Technology reviews and strategic planning
- Software selection
- Project rescue





## We're here to help...



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