



GOALS TO GROWTH

WHAT DO YOU NEED TO ACHIEVE YOUR FINANCIAL GOALS?

Every business is unique. Every business owner has specific aims and dreams. It's easy to lose sight of those when wrapped up in the day-to-day work of running your business. Let us help you focus your finances so you can achieve your goals, with a one to five year plan tailored to you and your business.

Goals to Growth is our ultimate service, combining coaching, mentoring and financial planning to unlock the keys to your business success.

01. STEP BACK AND TAKE STOCK



Why did you start your business in the first place? What are your business and personal dreams? We will sit down with you to look at what you really want from your business and your life. After that planning meeting we prepare a rolling business forecast so you can keep your goals clearly in your mind every day.

02. FOCUS TO MOVE FORWARD



Our Goals to Growth will give you complete clarity and our regular updates are a precise way to measure where you are against where you want to be. So, you will know exactly what you need to do daily to grow your business in a focused way. Knowing your financials inside out means you can be flexible as your business changes or grows.

03. GUARANTEED PEACE OF MIND



You can enjoy improved cost control because you will always know what you should be spending. We can give you an early warning of any areas where you are spending too much or not meeting targets and alert you to likely cost increases for your specific business.

OUR CLIENTS VALUE OUR BUSINESS ADVISORY AND MENTORING EXPERTISE...

We have worked with Michelle and Kevin for many years. We were a small partnership when we started using them for our annual accounts; as they grew as a company so did we. With all their expertise and advice we turned our £500K turnover business into a £3.5 million turnover business. They do our monthly management accounts and review and advise us on strategies to help us continually grow. The wide range of services they offer is amazing from tax advice to payroll and much more!



Danny Knight, Director Knight Fencing Ltd,
James Todd & Co client since 2007



WHAT WE OFFER AT A GLANCE

BUSINESS PLANNING AND STRATEGY MEETING

Setting Goals	✓
Setting targets and Key Performance Indicators (KPI's) to achieve financial goals	✓
Creation of budgets 1 - 5 years	✓
Creation of rolling cashflow forecasts 1 - 5 years	✓

MONITORING AND ADVANCED MANAGEMENT REPORTING

Analysis of margins on different revenue streams	✓
Analysis of Key Performance Indicators	✓
Profit and Loss variance analysis against previous periods and budget	✓
Departmental analysis	✓
Regular meetings to discuss results and review goals	✓

COACHING AND MENTORING

Understanding aspirations	✓
Discussing concerns	✓
Support in overcoming business challenges	✓
Advisory service	✓

We understand that every business is unique. All of our services can be expanded or tailored to suit the specific needs of you and your business.

DO YOU HAVE THE PLAN YOU NEED TO GROW YOUR BUSINESS?

Our Goals to Growth clients receive a clear financial plan for their business so you can have your goals clearly in your mind every day. As you move forward we are by your side to work through the challenges and issues you face as you get to where you want to be - professionally and personally.



HAVE YOU CONSIDERED ADDING TO YOUR BOOKKEEPING PACKAGE?

WE ALSO OFFER...

- ✓ Supplier and staff payment services
- ✓ Full payroll services
- ✓ Full bookkeeping services



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