



BEACHFLEISCHMAN

Strategic planning is an important step in creating the discipline within an organization to identify goals and objectives that will define success and then enable accountability. A critical element of any strategic plan is to address both ownership and management succession, as well as leadership development.

As part of BeachFleischman PC's Strategic Operations and Advisory Resources (SOAR) services, strategic and succession planning consultants help business owners and CEOs achieve their tactical, strategic, operational, and financial goals through strategy development and implementation. Recognizing that the best solution is the most practical and cost-effective, we collaborate with you to make sure that our recommendations utilize your current resources and talent rather than recreating the wheel. Our team brings in-depth industry specialization, business acumen, objectivity, creativity, and critical thinking to the table to produce innovative, optimal solutions.

## STRATEGIC SOLUTIONS

- Develop, create, and implement your organization's written strategic vision and plan
- Maximize current resources and leverage staff through organizational design
- Create an exit strategy for owners
- Structure your business entity to maximize tax benefits
- Evaluate, develop and implement growth strategies such as acquisitions, mergers, joint ventures, and divestitures
- Develop and implement your organization's succession plan to align current talent development with future leadership needs
- Establish a financial plan to meet current ownership's retirement and estate objectives
- Assist busy business owners in the areas of planning, leadership, sales, marketing, people, operations, finance, and legal on an on-going or project-based basis allowing business owners to focus on their own core strengths

## DO YOU NEED STRATEGIC OR SUCCESSION PLANNING?

- Desire to improve revenues or net income
- Desire to expand into new market areas or new product lines
- Change or pending change in ownership of business
- Conflicting leadership visions within your executive team
- Increased competition
- High employee turnover
- Changing economic environment
- Desire to transition management

## SERVICES:

- Strategic planning
- Succession planning
- Exit Planning
- Organizational design
- Core competencies assessment
- Operations assessment
- Facilitation of meetings/retreats