

# Workshop Preparation Kit for the Workshop

## “No-Frills Business Plans”

A Workshop Facilitated by  
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## Recommended Timeline for the Workshop

### 12 Weeks or More Before Your Workshop

Schedule and book the workshop with Lodestar. (12 weeks is the suggested minimum time to have a reasonable chance of getting the dates you want. On some occasions, it may be possible to book a workshop on a shorter time frame than this, but the earlier you contact Lodestar, the better are your chances of getting the date(s) you want.)

### 6 Weeks Prior to the Workshop

Notify your territory managers (TMs) of the coming workshop (if you have not already done so).

E-Mail out the invitation memo (a sample is included in this kit).

If you need to order audio-visual equipment, schedule it now. If you have it on hand, skip this step. Equipment needed: computer projector (VGA, SVGA, or XGA) and screen; flip chart with 1 full pad of paper.

If you decide to hold the workshop off-site, make arrangements for a meeting location. If you go off-site, remember to make arrangements for lunch or dinner (depending on when you decide to start your workshop) and early and late refreshment breaks.

### 2 Weeks Prior to the Workshop

Remind your TMs of the coming workshop. I **strongly urge** any TM who has a dealer in the workshop to attend and **assist** the dealer in creating a plan.

(Optional: e-Mail the confirmation notice to all who will be attending. See the sample in this kit.)

### 1 Week Prior to the Workshop

Print any materials from the master material sent to you by Lodestar (if applicable).

### 1 Day Before the Workshop

- Make sure the room is set up per the attached room set-up diagram.
- Make sure the audio-visual equipment and flip chart are set up and ready to go.
- Make sure the meals are set up.
- Make sure the breaks are set up. You should have coffee/tea on hand when your guests arrive; donuts and fruit are optional. Plan on a mid-morning break (around 10:00 am; refresh the coffee; add soft drinks) and an afternoon break (around 2:30 pm; soft drinks).
- Designate a representative from your distributorship to be present to start the meeting with welcoming comments, etc. (This person is not required to stay beyond the kick-off speech.)
- Make sure you have a **computer and printer** on hand in the room so the dealers can print their plans once completed. It is suggested that you have one or more USB flash drives on hand to make it easier for the dealers to copy their plans to the flash drive and from there, to print it from the printer you set up in the back of the room. I also suggest you have report covers on hand to "bind" the dealer and TM copies together so they look neat and stay together.

### Day of the Workshop

- Make sure your welcomer is present and has appropriate welcoming comments ready.
- One hour before the meeting starts, make sure the opening refreshments are out and ready and that the caterer is on schedule for the first and second breaks and meal.

### 1 Week After the Workshop

- You will be receiving the invoice from Lodestar for your workshop.

## Workshop Description

This down-to-earth two-day workshop shows how to write a 5 to 10 page business plan that focuses the company on results, not getting an SBA loan. Although the format taught here will not win any awards, it will produce measurable results!

Participants will need to bring a laptop computer with Excel 2003 (or later) to model several “what if” scenarios and write their own plans using a template provided by Lodestar on a CD-ROM the contractor takes home.

**Who** may benefit:

Dealer principals, upper managers

What the Participants will **do**:

- Learn the four core principles of this approach to business planning
- Calculate the specific impacts of various elements of their plans
- Write an actual business plan for the next fiscal year, print two copies (one for them, one for their TM) and take their copy home so they can start working on it.

### Deliverables:

Manual (~60 pages), CD-ROM (Word and Excel files and templates)

## Workshop Objectives

1. Describe the benefits of having a written plan for any given year.
2. Describe why focusing the plan's attention on production is critical to the success of the company.
3. Describe how to identify key objectives for the coming year and how to create a "fishbone" diagram to visualize what must be done to make improvements to the business.
4. Calculate the potential impacts of plan elements before the plan is actually implemented and modify if the results are not adequate.
5. Write a brief (5 to 10 page) business plan for the next fiscal year and print two copies (one for the dealer, one for the TM).

## Workshop Logistics

### What the Participants need to bring:

1. Their financial statements for the last three years including the latest financial statements for the current year. If possible, the dealer should have sales broken out by installation and service. Also, if possible, cost of sales should be broken out by installation and service (this includes equipment, materials, parts and supplies, labor, sub contractors, freight and warranty). No one will see these statements except the dealer and anyone he/she decides should see them.
2. A pocket calculator. A laptop computer (with Excel 2003 or later) is **essential**.
3. Pens and pencils, and note paper; copies of their recent advertising (newspaper, Yellow Pages, radio or TV scripts, etc).
4. A computer and printer in the back of the room to facilitate the dealers printing their plans.
5. You may also want to provide low-cost USB flash drives to each dealer to facilitate electronic storage, backup and transfer of the plans.

### What Lodestar will supply:

1. The CD-ROM with Excel 2003 business planning software.
2. Using territory data supplied by the distributor, Lodestar will prepare market potential reports for each county in the territory.

### What the Distributor should supply:

1. Print off the student workbooks from the PDF master supplied by Lodestar (~60 pages). Also print off about 120 copies of the fishbone diagram provided by Lodestar.
2. VGA/SVGA/XVGA projector for the instructor's computer; screen; flip chart and two pads of paper. Other items per the Lodestar Engagement Agreement. (Contact Lodestar for a quote.)

3. To assist the dealers in crunching numbers as they start their business plans, we suggest you have several computers in the room. You don't necessarily need one per dealer (although that would not be a bad approach), but 1 for every 4 dealers should be adequate.

## How To Sell It To Your Dealers

Lodestar believes strongly in (and teaches) the use of SPIN<sup>®</sup> questions. Therefore, we recommend that this workshop be sold using a series of SPIN<sup>®</sup> questions. The following are offered as possible question sets to use. Feel free to use them or create your own.

### **Situation:**

Do you have a written business plan for your business?

Do you know where you want your business to be five years from now?

### **Problem:**

Do you find yourself sometimes having to react to crises and problems more than running your business? Does that ever frustrate you?

Does not having a solid idea of where you want to be in five years ever cause you to doubt yourself or agonize over key decisions?

### **Implication:**

If you continue running your business without a written plan, you may be like a person taking a driving vacation without a map. You may end up somewhere, but not where you want. Does that prospect bother you?

### **Needs Pay-off:**

Business plans are usually a pain in the neck to write, but if you could learn a process that was simple and quick and that helped you focus on what was vital to your success, can you see yourself in five years enjoying the fruits of solid up-front planning?

## Workshop Cost Estimating Sheet

Item	Quantity	Cost Ea	Net Cost
Facilitation Fee (contact Lodestar)	1	\$ 6,500	\$ 6,500
Travel expenses (estimated, from Lodestar)	1	\$ 1,000	\$ 1,000
Workbooks (printed by distributor)		\$	\$
Arrival refreshments (x 2)		\$	\$
First break (x 2)		\$	\$
Meals (x 2)		\$	\$
Second break (x 2)		\$	\$
Audio-visual: projector/screen	1	\$	\$
Audio-visual: flip chart/2 pads	1	\$	\$
Room rental	1	\$	\$
“ Trinkets” you may wish to give away		\$	\$
Other (Computers? Printers? USB?):		\$	\$
Total workshop costs		\$	
Less Co-op from Manufacturer		-\$	
Net Cost to Distributor (Costs less co-op)		\$	
Markup to apply to costs			
Total workshop selling price (cost x markup)		\$	
Total expected attendance			
Charge per attendee (sell / attendance)		\$	

## Sample Invitation Letter

*Feel free to copy this letter (from Acrobat reader, select the text and Copy it, then Paste it into your word processor document).*

If you have ever sought a loan from a bank or the Small Business Administration, you may have had to write a complex document called a “business plan.” These eight to ten-chapter behemoths are difficult to write and intimidating to the average contractor. So most contractors don’t bother writing them (other than to secure the loan).

But there is a lot of evidence that suggests that a small business that **does** have a written business plan (no matter how simple or complex) does a better job over the long haul than the one who doesn’t.

On [date] at [location], we are going to host a workshop conducted by Richard Harshaw of Lodestar Consulting titled “No-Frills Business Plans”. The title suggests a lot—this workshop is fast-paced, hard-hitting, and focuses entirely on what steps you should put in writing to build a successful, profitable business. You will not learn the classical ten-chapter format taught in most business plan schools. That format is great for getting a loan (or a manufacturer’s award), but of little value to the average small business owner when it comes to actually building a better business. This workshop will show you how to focus on your **P**eople and your **P**rocesses in order to use your **P**roducts and services to maximize your **P**rofits.

Come spend two days with Richard as he uses humor and real-life examples to teach you the principles of writing a business plan that puts profit in your pocket. You’ll actually write the first draft of your plan in the workshop and print it to take home with you. Your account manager will be present to help you too.

So call today and sign up. Space is limited to the first 30 people. After that, we close the enrollment!

If you have questions, please contact [contact name at distributorship]. You can also visit Lodestar’s website for more information on the course ([www.lodestarconsultinginc.com](http://www.lodestarconsultinginc.com)).

[signature of distributor executive]

## Sample Confirmation Letter

*Feel free to copy this letter (from Acrobat reader, select the text and Copy it, then Paste it into your word processor document).*

This is a memory jogger to remind you that you are confirmed for \_\_\_\_\_ seats in our upcoming No-Frills Business Plans workshop being held on [dates] at [location].

To maximize your learning experience, bring your year-end financial statements from last three fiscal years, including your most recent statements for this year to date. You should also bring a summary of your payroll data for last three years and this year to date—total number of employees and how many months each worked. (No one will ask to see any of this data.) If possible, try to have your sales and cost of sales data broken out by department (Installation, Service, etc.). (If this is not possible, you can still get a great deal out of this experience; you'll just make better plans if you can extract these details.)

Also bring a pen or pencil, some note paper, a pocket calculator, a laptop computer with Excel 2003 (or later) and Adobe Acrobat Reader on it, and a desire to focus intensely on your business for a high-energy, charged two days of growth.

See you on the [date]!

[signature of distributor executive]

## Requested Room Layout

