

THE BUSINESS PLANNING PYRAMID



PLANNING

Each level expands in scope and reinforces the levels above and across the organization. Plans are developed by sales channel and are uniquely defined by their functional processes.

Utilize five levels to set a longer-term business strategy

Marketing

Defines who you serve, the problem you solve, and why you are the trusted choice. It drives awareness, demand, and qualified leads.

Key question: Why should someone choose us and how do they find us?

Fulfillment Plan

Outlines how the promise is delivered through processes, service standards, and client experience. This is where trust is earned or lost.

Key question: How do we reliably deliver what we promise every time?

Resource Plan

Identifies the people, systems, and tools required to deliver consistently and scale efficiently.

Key question: What resources must be in place to execute well and scale responsibly?

Finance + Legal Plan

Ensures profitability, cash flow discipline, risk management, and regulatory or contractual protection.

Key question: Is the business profitable, protected, and sustainable?

Business Enterprise Strategy

Clarifies the long-term vision, ownership intent, growth path, and exit or legacy objective.

Key question: What are we building and to what end?

