

## Packages for LivePlan Method

all deliverables based on the work of LivePlan Method



Package Item or Deliverable	\$1,200	\$800	\$500	\$250	Description of the work	Correlating LP Method Steps
	Business Performance	Business Growth	Business Insights	Business Maintenance		
Goal setting and business health check (or SWOT analysis)	x	x	x		Kick off Meeting - use resource guide (scale to package)	Phase 1 components
Financial KPIs in the Cloud	x	x	x	x	Syncing LivePlan 1 time, using Dashboard	1.03
Benchmark metrics in the Cloud	x	x	x	x	Syncing LivePlan 1 time, using Benchmarks	1.04
Strategic Planning Session	x	x	x		Plan Meeting - use resource guide	Phase 2
Lean Business Plan	x	x	x		completed Pitch - product of Plan Meeting	2.06
Business Overview Quick Pitch Web Page and PPT	x	x	x		output from completed Pitch, from LivePlan	2.06
One year sales forecast	x	x	x		completing one year Revenue only in the Forecast tab	4.01
Three year financial plan	x	x			Full Forecast tab	Phase 3 and 4
Monthly reporting package	x	x			Using Dashboard download and report feature	5.03
Financial scenarios, up to 2	x	x			allowing for two Forecast tab scenarios: original + one	Phase 4
Financial scenarios, up to 5	x				allowing for two Forecast tab scenarios: original + four	Phase 4
Monthly advisory meeting: plan updates	x				Advising Meeting - use resource guide	Phase 5
Business coaching	x				extra advice offered during the meeting or ad hoc	5.04
Dedicated account manager	x				other packages would NOT be dedicated person - upgrade	NA

### One-time fixed fee items

- SWOT + Target Persona
- Full Business Plan
- Full Lendor Ready Business Plan
- Proforma
- Competitive Analysis
- Marketing Analysis

