

## CASE STUDY

# BUSINESS PLAN & STRATEGY DEVELOPMENT PROJECT

## Snapshot

Reduce Chaos and Get Organized for Growth with a Business Plan.

Industry Sector: Digital Marketing Agency

Business Type: B2B

Employee Size: 35 employees

Sales Revenue: \$1m - \$5m

Year Founded: 2016

## Our Client

Our client is a successful US based Digital Marketing company with 35 employees who has been in business for more than 5 years.



## PROBLEM/GOAL

Our client grew significantly over the previous 12 months more than doubling sales and headcount.

The increase in the number of customers and the staff needed to service the new clients created a chaotic period for the company.

Sales increased and customer churn increased too as it became difficult to manage the increased workload, staffing challenges and finances without a solid plan to manage the new growth.

The consequence was revenue ups and downs, process inefficiencies, customer satisfaction challenges that in aggregate were impeding consistent growth.



## SOLUTION

The client realized that they needed to make changes in order to grow their business with confidence. They realized that they needed the help of an outside consultant who understood the challenges of an SMB growth company and who could understand their business, build a realistic plan and help them execute on that plan.

The client hired **Symbiotic Group (Michael Low)**, to take a methodical approach to understand their business, enumerate the challenges and opportunities for growth, and write a comprehensive business plan backed by solid financials to help chart a pathway for growth.



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## SERVICES PROVIDED

Creation of a comprehensive business plan, strategy and financial forecast including:

- Articulated corporate objective & value proposition
- Market analysis, business strategy, marketing plan, competitive intel and sales plan
- Operational plans, integrated IS/BS/CF forecast, KPIs and monthly reporting framework.

## RESULTS & BENEFITS

The result of the project was a solid business plan and strategy backed by an action plan to drive execution towards the business's stated objectives and goals. This has formed the basis for making solid business decisions and has enabled a more organized approach to business. The company now has a monthly management review process to measure progress towards business goals, KPIs and with a solid financial reporting plan for the future.

The client is enjoying more stable growth and better management control that has reduced business complexity. Sales and Profit are on track for a YoY 100% increase.

## FINAL RESULTS

**100%**

completion rate for monthly management review actions.

Sales revenue increased by  
**>100% YoY.**

Profit increased by  
**>200% YoY.**

"The Team at The Symbiotic Group have helped make our processes and business model repeatable and predictable. We are so pleased about our progress and excited for the future." [SMB business owner]