

BUSINESS CONTINUITY PLANNING - ACTIVITIES AND SERVICES ANALYSIS

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During this time of heightened uncertainty, we believe that once you have analyzed critical cash flow issues and decided on the best mitigation strategy, it is important to be proactive as opposed to feeling paralyzed by the ongoing economic slowdown. In our opinion, one way to be proactive is to analyze your current activities and/or services. We think this exercise will help you target your core money-making operations while shining a light on operations that could be discontinued or reduced. An honest discussion about the value deriving from your activities and/or services during a time of crisis can save you money now and position you for long-term growth. We hope this chart will help spark creative discussions in your organization.

Instructions: List your primary activities and/or services in the far left column. Then rate that activity or service on how easy it is to teach to someone else, whether it differentiates you from your competitors and whether it creates customer loyalty. Use a scale of 1 to 10 for each column. The top score for any single activity or service is 30. After you have discussed and rated each activity and/or service, you will have a basis for comparison and decision making.

Goal: Find the one or two activities and/or services that are easily teachable, find a way to differentiate them (if you haven't already) and build a plan so the activities and/or services create customer loyalty, which in turn leads to recurring sales.

Activities/Services	Teachable?	Differentiator?	Loyalty Creating?	TOTAL

*****Stratus is happy to discuss any questions, comments or concerns that come out of your analysis. You can reach Sam via email (sbrownell@stratuswealthadvisors.com) or phone (301-873-4602).***