

Service Packages for ConsultIO Method

Package Item or Deliverable	Monthly	Monthly	Monthly	Monthly	One Time	Description of the work
	Business Performance	Business Growth	Business Insights	Business Maintenance	Per Business Service	
Goal setting and business health check (or SWOT analysis)	X	X	X	X		Kick off Meeting - use resource guide (scale to package)
Financial Key Performance Indicators in the Cloud	X	X	X	X		Syncing Plan 1 time, using Dashboard
Benchmark metrics in the Cloud	X	X	X	X		Syncing Plan 1 time, using Benchmarks (accounting solution)
Strategic Planning Session	X	X	X			Plan Meeting - use resource guide, Virtual with key stakeholders
Lean Business Plan	X	X	X			Completed Pitch - product of Plan Meeting
Business Overview Brief Pitch (Web Page and PPT)	X	X	X			Output from completed Pitch, from Software
One year sales forecast	X	X	X			Completing one year Revenue only in the Forecast tab
Three year financial plan	X	X				Full Financial Forecast import from historical data
Monthly reporting package	X	X				Using Dashboard download and report feature
Financial scenarios, up to 2	X	X				Allowing for two Forecast tab scenarios: original + one
Financial scenarios, up to 5	X					Allowing for two Forecast tab scenarios: original + four
Monthly advisory meeting: plan updates	X					Advising Meeting - use resources guide/Industry Standards
Business Advisory	X					Expert advise offered during the meeting or ad hoc (once p/m)
Dedicated account manager	X				N/A	Would NOT have dedicated account manager as one time service

Additional One-time fixed fee service items

- SWOT Analysis -
- Full Business Plan -
- Full Lendor/Investor Ready Business Plan -
- Proforma -
- Competitive Market Analysis -
- Marketing Analysis - Negotiable Market Value
- Quantitative/Qualitative Business Research - Negotiable Market Value

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