



# LivePlan Method Task List for Strategic Advising

All the tasks necessary to perform comprehensive advisory services profitably, on a monthly basis for each client. Work tasks, order of operations, corresponding LivePlan software module, time duration, and work assignment.

A TEMPLATE IN:  **KARBON**



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# 4 Tools for Better Results

Maximize The LivePlan Method for Strategic Advising with these tools.

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## Cloud Pricing

You'll need a good tool to help with pricing. [Cloud Pricing](#) takes away the guesswork, and in many cases, the pressure of the "sale." LivePlan Method is an available template in your Cloud Pricing app.

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## Workflow Software

LivePlan recommends [Aero](#), [JetPack Workflow](#), and [Karbon](#). The LivePlan Method is available as a template in all of these software tools.

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## Strategic Advisor Blog

Read the LivePlan [Strategic Advisor blog](#) for education and inspiration on Strategic Advising for your small business clients.

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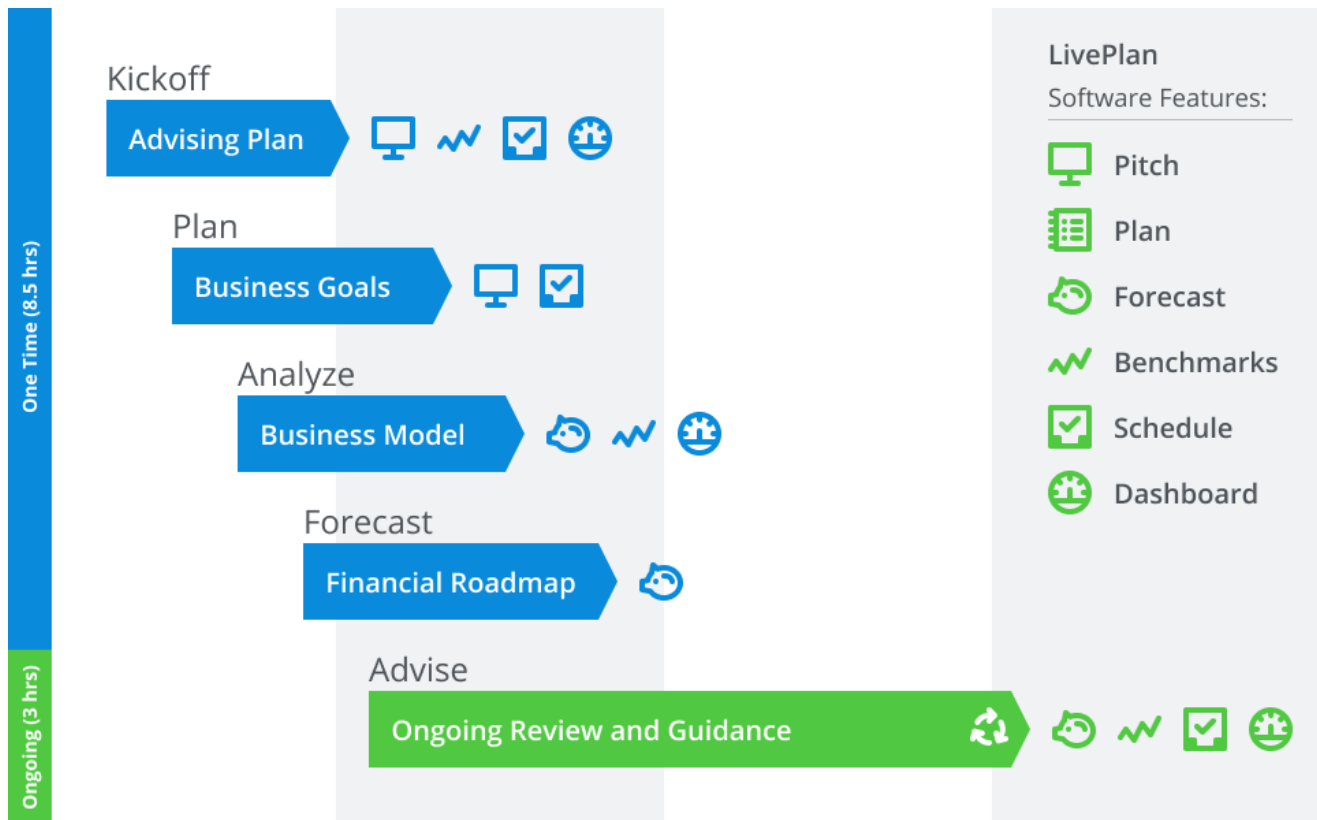
## Bplans

Use [Bplans](#) as a resource for your small business clients for their own education. Bplans is full of free content, and is your complete guide to business planning.

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# Timeline of Work

The majority of work happens one time as prep work. The repeated advisory phase is where the work becomes profitable.



One-time prep work = 8.5 hrs

Kickoff, Plan, Analyze, Forecast

Monthly recurring advisory work = 3.0 hrs

Advise

# Kickoff Phase

Frame the advisory relationship, learn your client's broad business goals and sell them on advisory. Also set-up the LivePlan account. This is a one-time process.

TASK	LIVEPLAN MODULE	TIME	JOB ASSIGNMENT
<b>1.01</b> - Create LivePlan Company from LP or Intuit App Center	Options	:03	
<b>1.02</b> - Connect accounting solution - apps.com is automatic	Dashboard	:03	
<b>1.03</b> - Check preliminary Mapping (from automated)	Dashboard	:15	
<b>1.04</b> - Set Benchmarks with appropriate variables	Benchmarks	:09	
<b>1.05</b> - Set up Pitch: company logo, headline, problem	Pitch	:15	
<b>1.06</b> - Schedule Kickoff meeting and record in Milestones	Milestones	:15	
<b>1.07</b> - Access the Kickoff Meeting resource guide	Kickoff mtg guide	:00	
<b>1.08</b> - Host Kickoff meeting - use resource guide	Kickoff mtg guide	:60	
	<b>Subtotal Kickoff</b>	<b>2:00</b>	



# Plan Phase

Perform Lean Planning. What does your client sell, how do they sell it, to whom, and what resources do they need? This is a onetime process.

TASK	LIVEPLAN MODULE	TIME	JOB ASSIGNMENT
<b>2.00</b> - Access the Plan Meeting resource guide		:00	
<b>2.01</b> - Plan Meeting: Problem Worth Solving and Business Solution	Pitch	:15	
<b>2.02</b> - Plan Meeting: Target Market	Pitch	:15	
<b>2.03</b> - Plan Meeting: Sales Channels and Marketing Activities	Pitch	:15	
<b>2.04</b> - Plan Meeting: Resources: partners, IP, patents, long term debt	Pitch	:15	
<b>2.05</b> - Plan Meeting: Revenue Streams and Milestones	Pitch	:15	
<b>2.06</b> - Publish Pitch to secret webpage or PPT for client review	Pitch	:15	
	<b>Subtotal Plan</b>	<b>1:30</b>	

We offer high-quality biking gear for families & regular people, not just gearheads



Problems worth Solving

\_\_\_\_\_

Our solutions

\_\_\_\_\_



Target market

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Analyze Phase

Establish an historical basis for your client's lean plan projections.  
This is a one-time process.

TASK	LIVEPLAN MODULE	TIME	JOB ASSIGNMENT
<b>3.01</b> - Review Dashboard data and note historical trends	Dashboard	:30	
<b>3.02</b> - Compare Benchmark metrics column to Actuals column	Benchmarks	:15	
<b>3.03</b> - If starting forecast from accounting data, review for trends	Forecast	:30	
<b>3.04</b> - Confirm preliminary forecasting categories	Forecast	:15	
<b>3.05</b> - Compile list of forecasting assumptions		:15	
<b>3.06</b> - Confirm Beginning Balances are correct	Forecast / Balance Sheet	:15	
	<b>Subtotal Model</b>	<b>2:00</b>	

# Forecast Phase

Build the roadmap: a full financial forecast of P&L, Balance sheet and cash flow.  
This is a one-time process.

TASK	LIVEPLAN MODULE	TIME	JOB ASSIGNMENT
<b>4.01</b> - Adjust preliminary revenue based on growth patterns	Forecast/ Revenue	:18	
<b>4.02</b> - Adjust direct expenses using GM target(s)	Forecast/Direct costs	:18	
<b>4.03</b> - Enter employee labor in Personnel or as expense line item	Forecast/ Personnel	:18	
<b>4.04</b> - Adjust expenses using established ratios	Forecast/ Expense	:18	
<b>4.05</b> - Enter Assets & schedule	Forecast/ Assets	:15	
<b>4.06</b> - Enter Dividends & schedule	Forecast/ Dividends	:15	
<b>4.07</b> - Enter estimated rate for corporate & sales taxes	Forecast/ Taxes	:09	
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# Forecast Phase

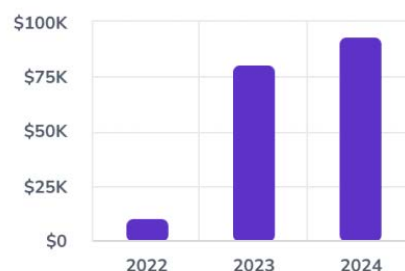
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TASK	LIVEPLAN MODULE	TIME	JOB ASSIGNMENT
<b>4.08</b> - Set Cash Assumptions (AR & AP Days)	Forecast/ Cash assumptions	:15	
<b>4.09</b> - Enter any Financing Needs based on the forecast	Forecast/ Financing	:18	
<b>4.10</b> - Confirm automated Beginning Balances	Forecast/ Balance Sheet	:18	
<b>4.11</b> - Finalize mapping	Dashboard	:18	
	<b>Subtotal Build</b>	<b>3:00</b>	

Projected cash



Cash at year's end



# Advise Phase

The monthly, repeated work of advisory. This is where the work becomes profitable.

TASK	LIVEPLAN MODULE	TIME	JOB ASSIGNMENT
<b>5.01</b> - Review Dashboard and LiveForecast: actuals, variance, trends	Dashboard, Forecast	:42	
<b>5.02</b> - Review Benchmark data	Benchmarks	:30	
<b>5.03</b> - Access Advise Meeting resource guide - prep for meeting	see Monthly Advising guide	:15	
<b>5.04</b> - Host monthly meeting	see Monthly Advising guide	:75	
<b>5.05</b> - Monthly wrap up—post meeting	see Monthly Advising guide	:18	
	<b>Subtotal Advise</b>	<b>3:00</b>	



## Additional Resources

Learn LivePlan Software – take advantage of our training and support.

- Live webinars and events
- Recorded trainings
- Dedicated customer support

**[LivePlan.com/Strategic-Advisors/training](https://liveplan.com/strategic-advisors/training)**

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