

# 9 Steps to Protect & Drive the Financial Performance of Your Business in 2021

1

## Review Your Costs

- Conduct a formal review for 2021
- Highlight & get rid of any unnecessary costs
- Explore options to streamline your business structure with your accountant

2

## Gain Visibility of Your Cashflow

- Set up a 13-week rolling cashflow forecast
- Monitor the cash coming in & going out of your business
- Set plans to ride out tight spots in advance

3

## Assess Your Team

- Do you have the right people?
- Are they in the right roles?
- What team actions are needed and when?

6

## Review Your Target Customer

- Who are they now?
- What do they need from you now?
- How can you reach more of them?
- Where can you reach more of them?

5

## Define Your 2021 Projects

- Define your key business projects for 2021
- Create ownership and responsibility for these
- Implement measurements to track your progress

4

## Review Your systems/processes

- Where are the inefficiencies in your business?
- Where do you need a new or tighter operational system?

7

## Enhance Your Customer Experience

- Review where it's good
- Highlight where there is room for improvement
- Review how well your competitors are doing

8

## Improve Your New Business Conversion Rate

- Where did you convert new business & where could you have done better in 2020?
- Where can you enhance your conversion systems?

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## Review Your Key Non-Financials

- How well are you doing on the stuff your ideal customers care about?
- Where do you have untapped business potential?

To discuss the steps you need to action, call the Clear Vision team on **01249 712074** or email [theteam@cvag.co.uk](mailto:theteam@cvag.co.uk)