

Business Planning

Making Business Planning sexy again!

RU March 2026

For those I haven't met before...

Experience

- + 18 years within Agency Recruitment- temp & perm white collar predominantly
- + 10 years Leadership experience- growing teams from the ground up
- + 8 years training, coaching and advising Junior Consultants through to Business Owners
- + 4 years experience building talent acquisition and HR functions/strategy/operations

Achievements

- + Founder of HopesConsult- training and HR consultant business for recruitment agencies in Australia
- + Co Founder of Lotus People Recruitment- multi award winning business support agency
- + Advisor for multiple multi million dollar Recruitment Agencies
- + Training partner for A Positive and Recruitment United as well as guest speaker on panels, webinars and poddies

Why most business plans don't work!

We've all done them. Cumbersome documents that we shove in a drawer on the 2nd July, never to surface again.

- + Most business plans fail because they focus on EVERYTHING WE ALREADY DO, RATHER THAN WHERE WE NEED TO IMPROVE!
- + They become a job description with a wish list attached, and even the most academic of us don't have the time to review a 5-10 page word doc every week.
- + For a business plan to work, it needs to be short, sharp, concise, and focused on the ACTUAL PROBLEMS you are trying to solve now.
- + You are already doing the things you are doing well- the plan needs to be focused on the areas you need to improve!

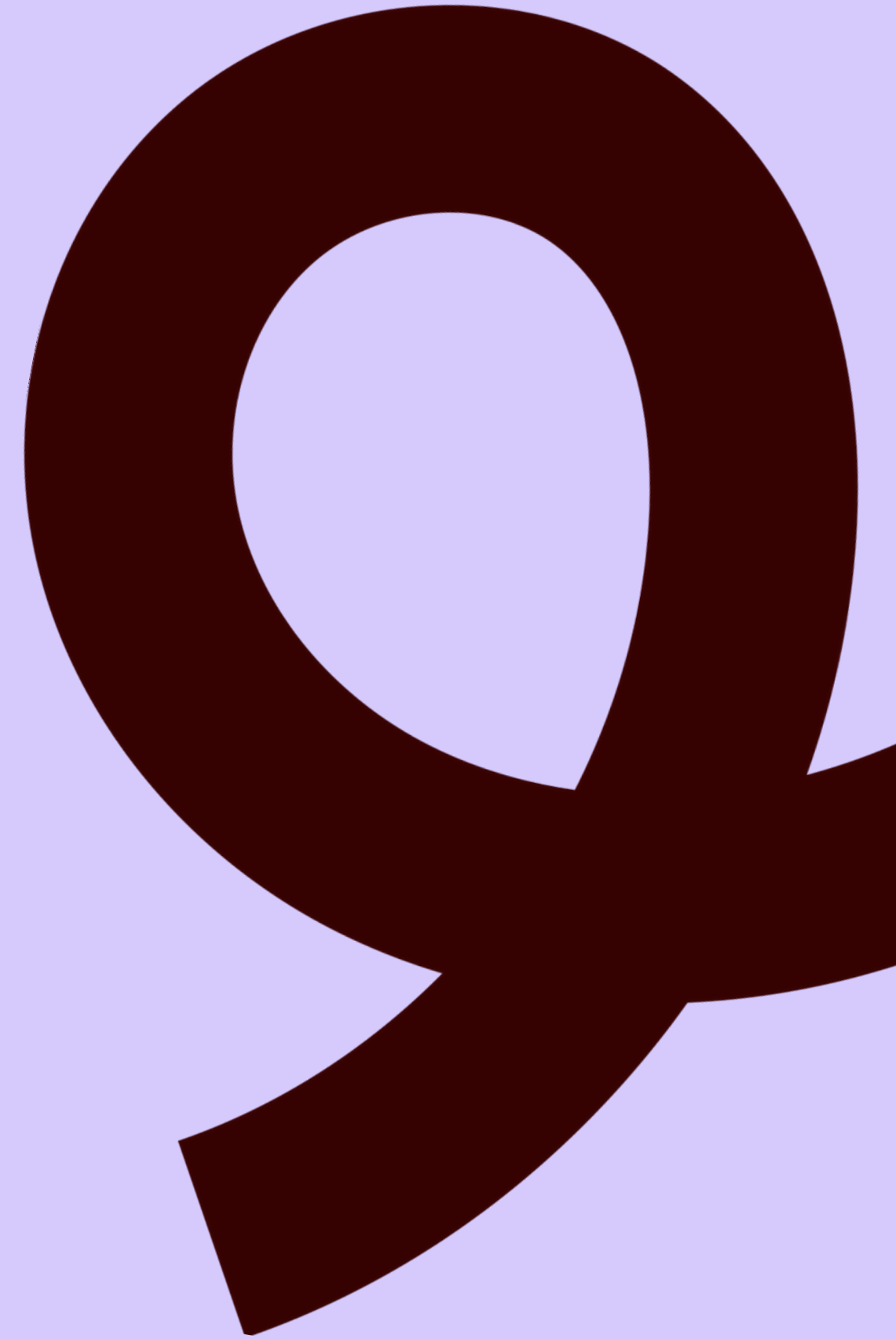


Shaping the plan

+ Your business plan should answer just these 5 questions for the year.

- By the end of the year, what does success look like?
- What will hold me back from realising that success?
- What must change in my behaviour?
- What must change in my activity?
- How will I review to stay on track?

+ We are looking at focused, measurable change, rather than an overarching grand plan detailing everything you already do!



Part 1- set your goals- 5 P's

SMART- specific, measurable, achievable, relevant, time bound

- + Most goals in business plans are not based on reality. They become a wish list that you aspire to, without the structure to ensure they are achieved. For each goal you create, think about the SMART format in the context of the next 12 months.
- + Goal 1- profit based- billings/commission
- + Goal 2- pipeline based- candidate/client engagement and retention
- + Goal 3- process based- conversions, ratios, productivity
- + Goal 4- professional development
- + Goal 5- personal- what will the above allow me to do?
- + Having a personal goal linked to your business plan becomes your intrinsic motivator for the year- what will success allow me to achieve personally!



Part 2- Find the constraints to success



Finding your constraints

If you want to make change, you have to find the blocks that are holding you back.

Review your entire workflow and find the constraints that may affect meeting those goals- these are the areas that need improvement or currently have a friction point.

Example- Generating new leads for BD

Choose 3-5 to focus on fixing this year.

Workflow example

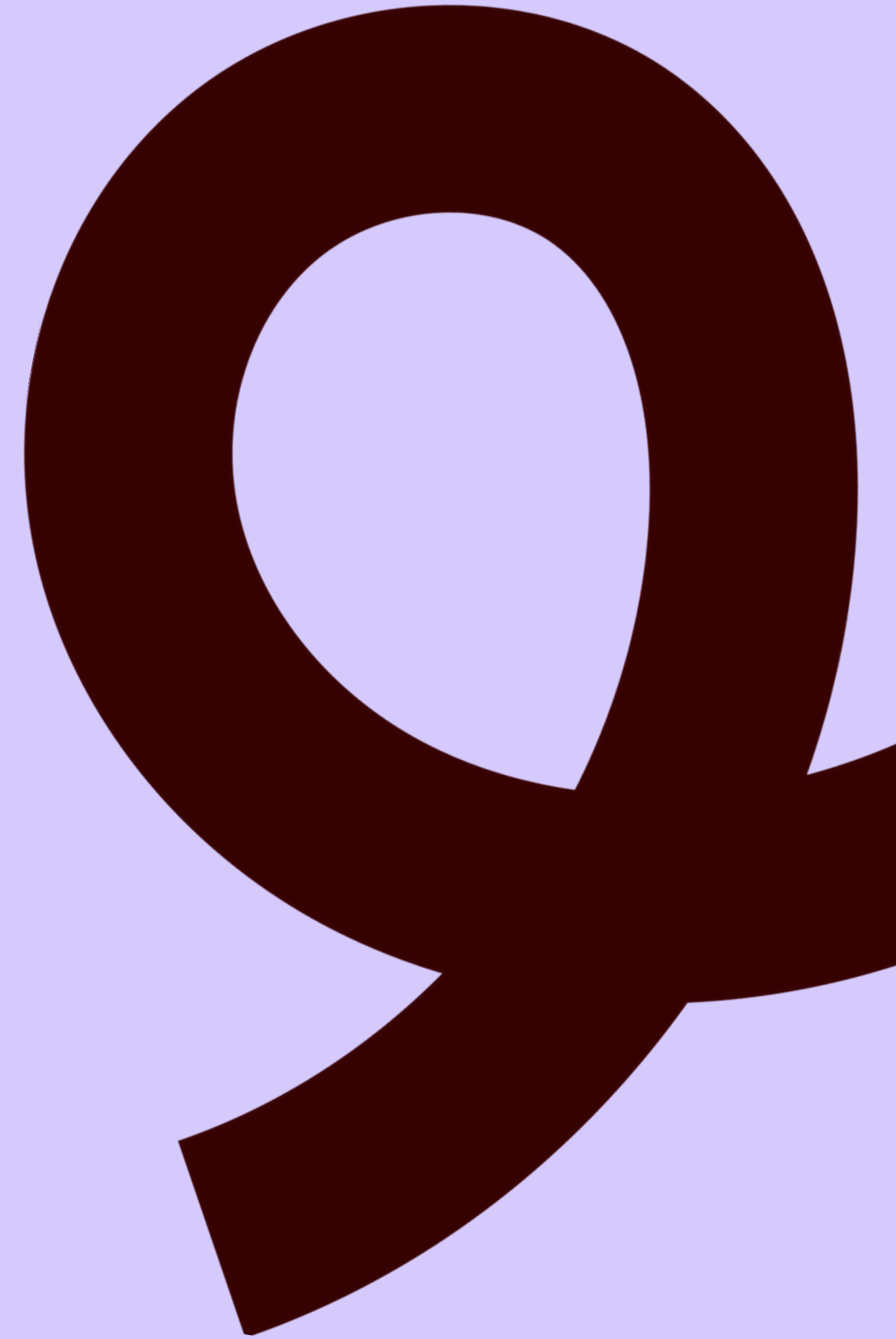
- BD Prep and research
- BD Strategy
- BD outreach process
- Client conversion
- Candidate outreach and engagement
- The recruitment process
- Placement and post placement care
- Client retention and expansion
- Time management/daily productivity
- Use of tech/automation

Part 3- What must change in my behaviour?

- + Thinking in behaviours over intentions creates real change.
- + Consider a mission statement- they fail when there are no evidenced behaviours linked to them.
- + Your goals are your missions- your behaviours bring them to life!
- + Pick a behaviour to change for each of your constraints that will help you to improve.

Example-

- Constraint- generating new leads for business development
- Behaviour- committing to 1 hour of weekly business development prep and research time



Part 4- Turning the behaviours into activity

Making it measurable

- + Activity targets ensure the behaviour is measurable, accountable and linked to tangible outcomes.
- + 1 activity measure for each behaviour- ideally tracked weekly.
- + Ideally these will be committed to time slots, but as we know, in recruitment, those times may have to be flexible!

Example

- + Behaviour- committing to 1 hour of weekly business development prep and research time
- + Activity- generating 10 new HOT client leads per week and 30 new connections on LI
- + Time slot- Monday mornings 9-10am

Part 5- Executing and Reviewing



Execute

You now have:

- 5 goals for the year
- 5 constraints that will potentially hinder those goals being achieved
- 5 behaviours that will help to fix those constraints
- 5 weekly activity commitments that allow us to measure those behaviours in action

That's your plan for the year. Now you need to ensure it works.

Review

Each quarter, review:

- Am I hitting the activity targets?
Why? Why not?
- What moved/changed?
- What didn't?
- What did I learn?
- Is the constraint still there?
- If yes, what else can I try?
- If not, is there something else?
- What do we need to adjust next quarter to make the plan work?

There you have it!

It is simple

+ It is tangible

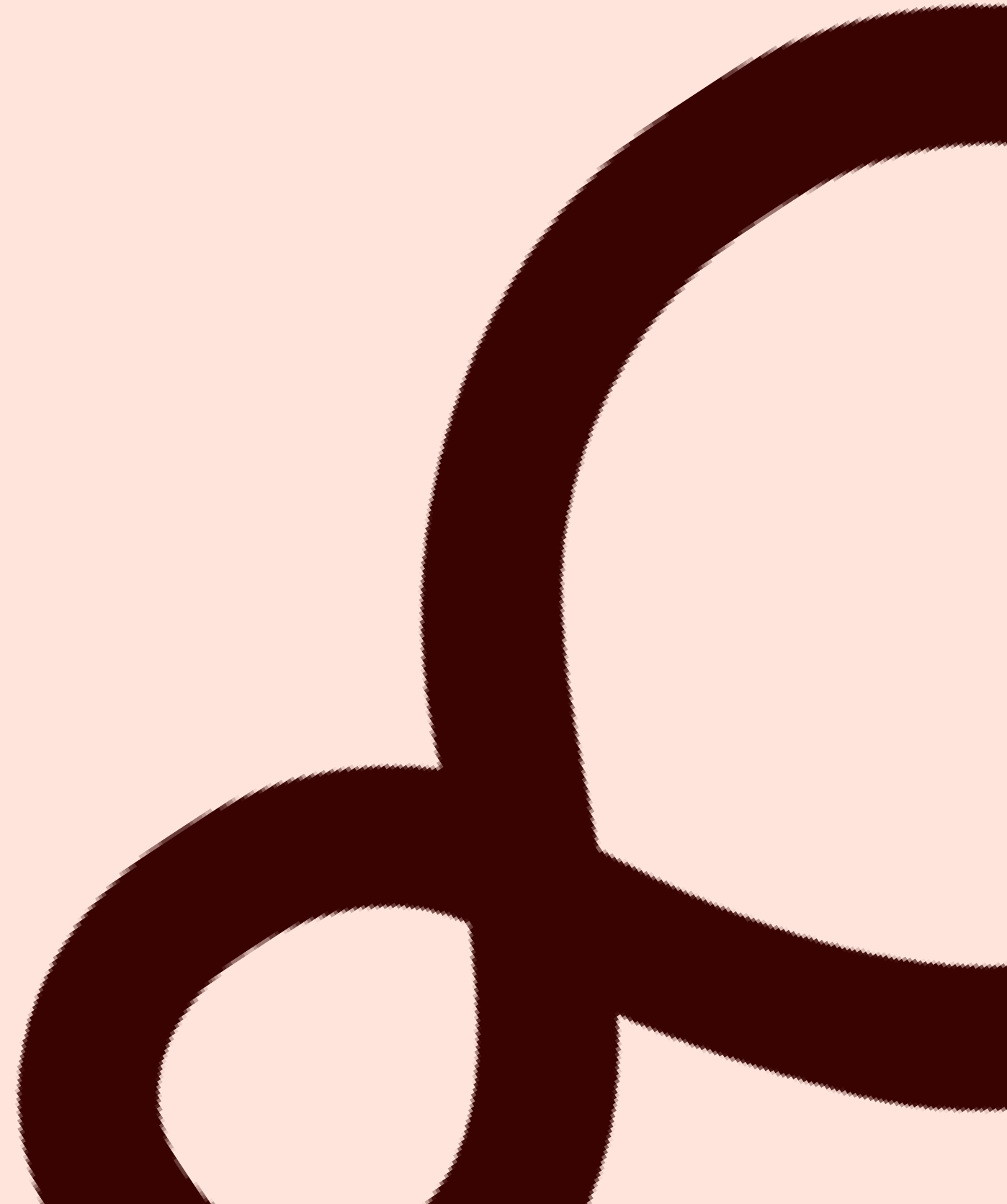
It is focused moving the needle, not re writing your JD

It is easy to execute and refer to

It is reviewed and refined regularly

It is SEXY!

+ Don't overthink it- 30-45 mins to spend on this is perfect, get your brain on a page and get into action!



Questions?

+ THANKS GANG!

