



ABOUT THE PRODUCT

Comprehensive Tactical, Planning, Reporting & Analysis

This is a stand-alone opportunity to learn how to formulate a business plan and learn the tactical approach to using tools and output as a real-time guide to keep you on track to achieve financial goals. The coaching and courses include detailed volume, revenue, expense, and capacity planning coupled with robust analysis and reporting. This is an added layer of detail to the **Business Tactical, Planning and Analysis** package, which is included, making this the most robust package I offer.

Plan and compare actuals to plan at a very detailed level. I refer to this as *Finance in a box*. I will provide monthly, over a 6–12-month period, a comprehensive, actionable reporting as if you had your own multi-million-dollar Decision Support Department encompassing accounting, finance, analysis, and business analytics resources.

It is a customized solution specifically for how you conduct your business. We will invest the necessary time in discovery in order to obtain a thorough understanding of your business. We will review every aspect of your business that is relevant to your financial plan. We will incorporate practices in the Sales Activities Tracker to begin the revenue *waterfall*. You will learn concepts such as Variable Costs, Cost of Origination, Contribution Margin, and more.

Additional metrics will be introduced which assess the health of your company. We will formulate capacity planning which is a form of *right-lining* to establish proper balance for your business. You will learn the use of your actual results to formulate a rolling forecast to help you keep track of your goals.

Lastly, you will receive the most comprehensive financial planning and analytic solution for business owners. We will introduce additional metrics to assist with right-lining. Delivery of a full suite of actionable reporting, analysis, and executive summary on a periodic basis similar to Fortune 500 company methods will be provided. The work product is a foundational *investment* in your business which will provide benefits year after year for many years to come.

This is your most comprehensive business planning tool of the future, custom-designed to your specific needs. This service is like having access to a Best-in-Class Fortune 500 company finance department—at a fraction of the cost.

One on one customized coaching and learning sessions include:

- **All the items in the Business, Tactical and Financial Planning Module**
- Incorporate Sales Activities & Forecast Tracker
- Introduce Capacity Modeling
- Introduce Funded Loan Characteristics
- Flexibility to focus on specific items as they present themselves during the module period



2 Seats Available

Required 6-month Focused Commitment: 6-month hands-on commitment learning and coaching to create the work product. Participation is limited and payment is front-loaded due to the intense amount of preparation to create the work product. \$3999.50 /month for 2 months.

Optional 6-month Extensions: \$499 / month, for an additional six months to complete a full 12-month business cycle.

ABOUT THE CONSULTANT

Andy comes to us with an extensive mortgage background of 20+ years creating partnerships at all levels in sales, operations, corporate executive, and individual business entrepreneurs. He is formally trained earning a major in accounting and a minor in finance while contributing his skill with several Fortune 500 companies.

Focusing on client partner specific needs and levels of understanding while tailoring a solution that is easy to understand and follow. He truly believes in taking complex concepts and delivering in a manner that is understood at all levels from the novice to the seasoned veteran.

He prides himself in being able to speak the client's language and thus articulating appropriately. Andy's value is endless as he can apply knowledge from several business industries to assist you in creating, monitoring, analyzing, and adjusting business plans as needed in order to achieve your goals. He possesses the unique ability to live and work in the details while keeping focused on vision and goals. He compares himself to you having the power of a successful Fortune 500 company accounting and finance department, your CFO at a fraction of the cost. Most of all the training, tools and value received will benefit you for many years to come.

