

RACHAEL CLARK CONSULTANTS LLC

Business Planning & Organization Sample

A strategic startup planning package for a fictional service-based business

STRATEGY	ORGANIZATION	ACTION PLAN
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Fictional Sample Client: Evergreen Home Organization & Concierge LLC

Prepared as a professional portfolio example to demonstrate planning, documentation, and business organization services.

SAMPLE PROJECT SCOPE

Business concept clarification • service packaging • target audience definition • operating workflow • launch priorities • 90-day action roadmap

Executive Snapshot

A concise planning view that helps a new business owner understand what the business is, who it serves, what it sells, and what must happen first.

Business Concept	A mobile and virtual home-organization and personal concierge service helping busy households create functional spaces and reduce day-to-day clutter.
Primary Customers	Busy professionals, working parents, older adults downsizing, and households preparing for moves or major life transitions.
Core Revenue	Fixed-price organization packages, hourly concierge support, move-preparation services, and recurring maintenance visits.
Immediate Priority	Launch a clear service menu, establish intake and scheduling processes, build referral relationships, and secure the first five paying clients.

Business Goals

- Create a simple service structure that customers can understand without a long consultation.
- Build repeatable intake, scheduling, payment, and follow-up processes.
- Develop a professional brand presence that communicates trust, discretion, and organization.
- Reach consistent monthly revenue through a mix of one-time projects and recurring support.

Consulting focus: Turn a broad business idea into a structured, sellable service model with clear next steps.

Service Structure & Target Market

The goal is to make the offer easy to understand, easy to quote, and easy to expand as the business grows.

Sample Service Menu

Service	Sample Price	What It Includes
Fresh Start Organization	\$195 starting	One focused area such as a pantry, closet, home office, or entryway.
Move Ready Package	\$425 starting	Pre-move decluttering, sorting, labeling, and move-preparation support.
Concierge Support	\$45/hour	Errands, appointment coordination, vendor scheduling, and household task support.
Maintenance Membership	\$149/month	Recurring organization touch-ups and planning support for returning clients.

Ideal Customer Profiles

Busy Professional: Values convenience and wants a trusted person to create order without spending weekends on the project.

Working Parent: Needs practical systems that make mornings, school routines, and shared spaces easier to manage.

Downsizing Household: Needs help sorting, organizing, and preparing belongings before a move or lifestyle transition.

Referral Partner: Realtor, senior-move specialist, apartment community, or local service provider who can refer clients.

Client Experience & Operating Workflow

A repeatable workflow reduces confusion, protects time, and creates a more professional customer experience.

1	Inquiry	Customer submits a short inquiry describing the space, task, timeline, and preferred contact method.
2	Discovery	A brief call or questionnaire confirms the project size, priorities, access requirements, and expectations.
3	Scope & Quote	Customer receives a written scope, estimated timeline, price, payment terms, and any preparation instructions.
4	Service Delivery	The work is completed according to the agreed plan, with updates provided when appropriate.
5	Closeout	Customer receives final recommendations, maintenance guidance, receipt, and an optional follow-up offer.

Recommended Business Tools

- Service inquiry form
- Client intake questionnaire
- Quote / scope template
- Invoice and payment process
- Scheduling calendar
- Project closeout checklist
- Referral follow-up template

Marketing & Client Acquisition Plan

The first marketing goal is not maximum reach. It is consistent visibility among people most likely to need, trust, and refer the service.

Channel	Use	Priority
Referral Network	Realtors, apartment communities, movers, senior-service providers, local business owners, and previous customers.	HIGH
Local Social Media	Before-and-after organization content, short tips, service spotlights, and local community groups.	HIGH
Google Business Profile	Local search visibility, reviews, service descriptions, and geographic reach.	HIGH
Community Networking	Vendor events, neighborhood groups, business associations, and community organizations.	MEDIUM

Core Marketing Message

“Less clutter. More function. Practical organization designed around the way you actually live.”

90-Day Launch Roadmap

A phased launch plan keeps the owner focused on the activities that create readiness, visibility, and revenue.

DAYS 1–30 FOUNDATION

- Finalize service menu and pricing
- Create intake, quote, invoice, and scheduling workflow
- Complete website and business profile
- Build referral contact list

DAYS 31–60 VISIBILITY

- Begin local content schedule
- Contact referral partners
- Collect first testimonials
- Track inquiry sources and common customer questions

DAYS 61–90 GROWTH

- Launch recurring maintenance offer
- Review profitable service types
- Refine pricing and boundaries
- Create referral incentive or partner package

What This Sample Demonstrates

- ✓ Turning an early-stage idea into a clear business structure
- ✓ Defining customers, services, pricing logic, and operational workflow
- ✓ Creating practical launch priorities and a realistic action roadmap
- ✓ Presenting business information in a polished, client-ready format

Rachael Clark Consultants LLC

Business planning • professional documentation • project support • customized business solutions