PLANNING + MANAGEMENT

Blue Wing Method
2017

Dive in and take a deep look at your business

1 ANALYZE
Assess your risk

- Risk management: financial, operational, staffing and owners
- |A| Risk tolerance analysis and coalescence
- |B| Environmental scans
- |A| SWOT analyses
- |B| Design/implement risk management and safety plans

2 FACILITATE
Raise capital

- Identify capital sources and produce funding proposals
- Integrate financing into existing financial systems
- Create a financial plan based on each stage of company growth
- Clear expectations: operating agreements, investor arrangements and tax planning
- Debt financing, line of credit management, equity financing

3 IMPLEMENT
Manage, work and grow

- Manage assets and liabilities for multiple firms, joint ventures, co-packing and contract production agreements
- Manage expansion and national distribution
- Identify liabilities and nexus for sales, franchise, and income tax, and implement compliance systems
- Perform due diligence for investors, mergers and growth to ensure state and federal compliance

4 EVALUATE
Team build and maximize stakeholder value

- Strategic planning sessions with managers and core staff
- Create cross-functional teams for input, buy-in and accountability
- Create financial and operational road map to achieve business goals
- |A| Model financial projections
- |B| Ensure an accurate and attainable exit strategy
- Distill created value and identify leverage points for stakeholders

5 SCALE
Maintain the standards as you grow

- Identify and leverage certifications and associations that are best-fit
- Manage application and certification process
- Maximize certification and trade group memberships
- Maximize quality management and control systems

TO FUTURE SUCCESS

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