

RACHAEL CLARK CONSULTANTS LLC

# Business Planning & Organization Sample

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

STRATEGY

ORGANIZATION

ACTION PLAN

**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 | <b>Inquiry</b>           | Customer submits a short inquiry describing the space, task, timeline, and preferred contact method.           |
| 2 | <b>Discovery</b>         | A brief call or questionnaire confirms the project size, priorities, access requirements, and expectations.    |
| 3 | <b>Scope &amp; Quote</b> | Customer receives a written scope, estimated timeline, price, payment terms, and any preparation instructions. |
| 4 | <b>Service Delivery</b>  | The work is completed according to the agreed plan, with updates provided when appropriate.                    |
| 5 | <b>Closeout</b>          | 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