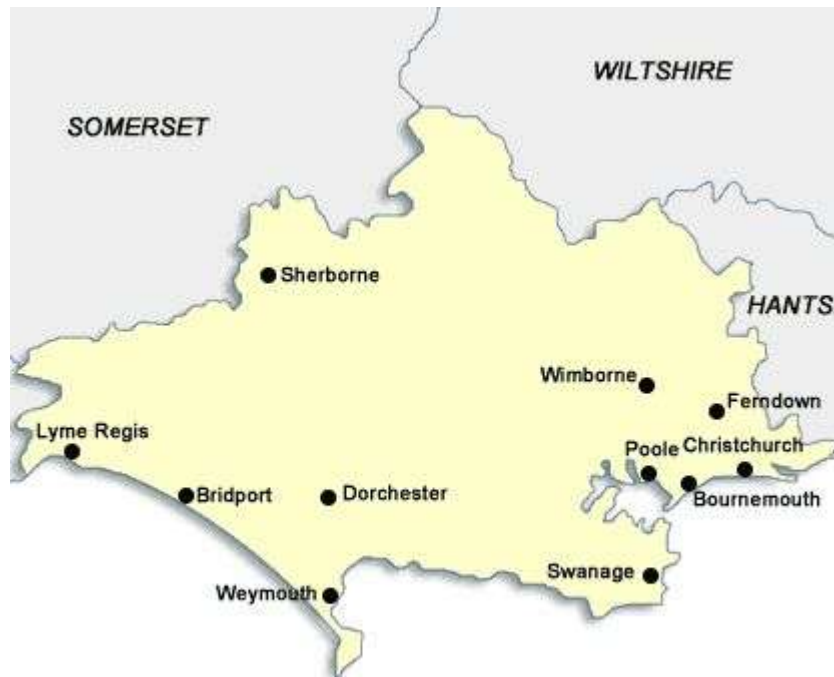


**Dorset Franchise Business Plan 2014** v1.04

**For membership distribution**

**Paul Haley**



# Contents

<b>Executive Summary</b> .....	3
<b>Current Position</b> .....	3
<b>Aims and Objectives</b> .....	4
<b>The Opportunity and Market</b> .....	4
<b>Market Statistics</b> .....	5
<b>Business Background</b> .....	6
<b>BNI Background</b> .....	6
<b>Delivery</b> .....	7
<b>Additional Information</b> .....	7
<b>Appendices</b> .....	<i>Error! Bookmark not defined.</i>

## **Executive Summary**

This is a plan to implement growth in the BNI Dorset Franchise region following purchase in the last quarter of 2014. The region has been less focused on in recent years due to the changes in the current franchisee's personal circumstances and their desire to retire. I believe that this small region has the potential to grow and with due care and attention could reach a maximum of 25 chapters with some close geographic areas supporting more than one chapter. With an average of 32 members per chapter this would generate a gross income in excess of £380,000 at current membership rates. I have prepared this plan with a conservative view with growth identified over the whole franchise term. When I returned from overseas and then after setting up my own consultancy practice I struggled to find the clients or contacts that I needed to establish and grow my business. I knew from experience that the old adage it's not what you know but who you know always holds true. I needed to meet business owners and had no idea where to find them. A friend invited me to my first BNI chapter meeting and being new to the system, I have to say, I hated every minute of it, needless to say that particular chapter no longer functions. Luckily I was invited to another BNI but this time it was a core group meeting and even though I didn't intend to I left that meeting having joined there and then. I finally "got it". The passion I have for BNI and its renowned business relationship marketing process has so appealed to my business sense that I was drawn into becoming firstly an AD and more recently a DC within my home region. I have been a chapter member in the same group I was a core group member for over 12 years. I get most of my new business contacts through BNI not only locally but throughout the UK with the utilisation of BNI Connect and visiting other chapters. In my capacity as a business advisor one of the first questions I ask a potential client is "are they a member of BNI?" if not why not? Without the formal structure and training I believe that the statistics of new business failures (95% of new business start ups disappear before year five) would be a whole lot worse.

I was attracted to the Dorset Region for a number of reasons; I have worked and networked in Bournemouth for the past four years and now know the area well and have many contacts within the region. I live in Wilton to west of Salisbury and on route to Dorset, Shaftesbury is about 15 – 20 minutes away my office is based in Totton which although in Hampshire is on the M27 and also only 20 minutes away from the Wimborne Chapter so I feel that I am ideally based to deliver the growth plans outlined to the region.

## **Current Position**

Dorset is currently what is left after the present owners have downsized and sold off the other regions they had been responsible for. It is a small region in BNI terms with only 5 Chapters currently running with one core group due to start in Sept 2014 by the author of this plan.

Outline figures suggest that Dorset currently has approximately 88 members of which 59% member

retention is expected. Market conditions and regional analysis would suggest that this region has the capacity to grow from 5 Chapters to over twenty chapters in the coming three years bringing in increased value to the investor and to the Franchisor.

From the economic data Dorset is home to 33,500 businesses and to run 20 chapters we would only require fewer than 1.9% to be interested.

## Aims and Objectives

To grow the region in both numbers of chapters and numbers of members I expect to grow the region having identified and trained a team of DC's to having 10 chapters within 12 months and 20 plus chapters with 48 months additionally having the majority of chapters never having less than 25 members with two or three key chapters having in excess of 40 members a large catchment area over the next two to three years. I am aiming to have the average chapter size throughout the region to be 32 members. Utilising the tried and tested BNI systems and methodology which will include the expected BNI chapter offering (goals include getting all chapters to achieve 45 members), of training and external networking plus new chapter establishment and membership growth.

## The Opportunity and Market

Dorset has a vibrant and growing business community supported by the Local Authorities, Unitary Authorities and more recently the Dorset LEP.

They have identified 16 Business Locations each of which could support a BNI chapter with the bigger more vibrant areas such as Bournemouth, Poole and Weymouth being able to support multiple chapters.

Town	BNI Status	Ch	Population
1. Blandford	Chapter just closed	1	9,160
2. Bournemouth	One chapter could be two or three	2	168,400
3. Bridport & Beaminster	Small maybe	1	16,220
4. Christchurch	One chapter	1	47,300
5. Dorchester	Proposed Chapter	1	18,280
6. Ferndown	One Chapter existing	1	17,800
7. Gillingham	Proposed Chapter	1	10,890
8. Poole	One Chapter should be two	2	147,600
9. Shaftesbury	Core Group about to be set up	1	6,640
10. Sherborne	One Chapter	1	9,590
11. Sturminster Newton	One Chapter	1	3,840
12. Swanage	One Chapter	1	9,840
13. Verwood	One Chapter	1	14,930
14. Weymouth and Portland	One Chapter could be two	2	63,530
15. Wareham	One Chapter	1	5,580
16. Wimborne	One Chapter existing	1	6,780
		19	



## Market Statistics

### Economy Facts & Figures

Here are some key facts and figures from the Dorset Economy that build the case for making Dorset home to your business:

- Land coverage: 265,273 hectares
- Active people: 77.3%
- Easy access to markets, the region's road, rail, air infrastructure together with 3 commercial ports make it an excellent gateway to the UK, Europe and beyond
- **Number of businesses: 33,550**
- Entrepreneurship: 47.3% business survival rate - compared to the UK average of 44.4% for firms in operation for at least 5 years, rising to 51% in Dorset County
- Education: 26.5% with GCE A level or equivalent - aged 16-64 – compared to the UK average of 22.5%
- Labour costs lower than the UK average
- Property costs well below London, the South East and the M27 corridor

## District and Borough Profiles

The County of Dorset comprises Dorset County Council with 6 district and borough areas. There are also 2 unitary authorities: Bournemouth Borough Council and the Borough of Poole.

1. Christchurch
2. East Dorset
3. North Dorset
4. Purbeck
5. West Dorset
6. Weymouth and Portland

[See full area Map appendix C](#)

## Business Background

I have been running my own successful business advice and coaching consultancy since I returned from living and working overseas for 12 years in Cyprus and Dubai. Some key career achievements have been:

- Ensuring that every client grew during the recent recession not one of my clients reduced their turnover or profitability since 2008
- I am now a Director/Shareholder of a successful health care supplier which had a zero turnover in 2005 to turning over £1.2 million pounds in 2011-12 1.6M 2012 – 13 and projected growth in the coming years with net profits running approximately 18%.
- Created and am a Trustee on two charities one dealing with the training of doctors and healthcare professionals in Eastern Europe to use modern drug combinations to help control HIV/AIDS and one dealing with raising funds to help the families of returning military personnel suffering from PTSD.
- Set up one of the first carpet manufacturing companies in Dubai from original concept to £5m turnover within 3 years, establishing Emtex as a leading dealer of high quality handmade carpets for the lucrative palace refurbishment market with over 150 employees and full budgetary control. [See full CV appendix b](#)

## BNI Background

I have been involved as a member of BNI since late 2002 and have been acting as, firstly an Assistant Director and more recently a Director Consultant in my home region and have experience in starting core groups and launching new chapters.

I have attended six national conferences plus many other training days I have also trained numerous chapters in all the basic skills workshops, MSP, Referral Skills, Chapter Growth, and Presentation

Skills etc.

I understand the concepts and ideals behind the givers gain and am totally committed to taking that message to the wider business community.

I am currently starting a core group in the region for the existing franchisee at Shaftesbury which is targeted to be launching towards the end of September 2014.

## **Delivery**

I would be delivering this through a standalone limited company which would invest the franchise purchase funds and provide initial working capital. I expect to identify and take on 4 DC's in the first year with additional DC's as required to respond to growth. I will be outsourcing all the back office administration to a local trusted company SmartPA who I know and have worked with before.

## **Financial Plan**

### **Headlines from the 2 year cash flow forecasts**

Increase in members from 88 to 221

Increase in Chapters to 10

### **Year 3 – 5**

Increase in membership to 640

Increase in Chapters to 20

## **Additional Information**

B Directors CV

C Regional Map

Appendix B  
Directors CV



## PAUL HALEY

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Tel: 07887 7553242; Email: [paul@sterlingbusiness.co.uk](mailto:paul@sterlingbusiness.co.uk)

### KEY ACHIEVEMENTS

- Appointed Director and Shareholder within a specialist health supplier and have taken this company from start up five years ago to turning over £1.2 million pounds in 2011-12 - 1.6M 2012 – 13 and increasing
- Specialising working with Family business and partnerships has created a bespoke programme of creating a strategy for stabilisation and growth for those companies.
- Working with new and traditional technology companies to identify and open new market sectors for existing and new product ranges.
- Dealing with a range of businesses from retail to manufacturing focusing on problem solving and creating confidence to change within an organisation.
- Trained and worked as a business mentor and coach with Oxford Innovations Growth Accelerator programme
- Led on the set up of the first manufacturing company in Dubai from original concept to £5m turnover within 3 years, establishing Emtex as a leading dealer of high quality handmade carpets for the lucrative palace refurbishment market with over 150 employees and full budgetary control.
- Specialist in creating, managing and growing overseas markets especially the middle and far east
- Developed strategy, marketing and business plan for the restructure of a group of Ethiopian manufacturers, funded by the World Bank to break into world markets with local products.
- Delivering a range of marketing seminars to local colleges and the student body of the European College of Chiropractors in Bournemouth to encourage professional practices to adopt modern marketing techniques.
- Successfully restructured and refocused IT company to enter into new markets with impressive increases in return on investments and profitability.
- Representing Advantage Business Angel's network locally as a Regional Deal Manager
- Working with BNI networking to start new groups and grow existing groups. Teaching networking skills and presentation skills to small business owners.
- Currently have a base of over 20 live contracts, delivering business advice and support to companies throughout the UK

### EMPLOYMENT HISTORY

2005 to Present **Phoenix Health Care Services Ltd Director/Senior Shareholder**

Delivering emergency care workers to care homes situated in Cornwall have over 50 employees and a weekly wage bill in excess of £12,000 and annual turnover of £1.6 Million

2002 to present **Sterling Business Limited - Managing Director / Owner**

Delivering Management Consultancy services aimed at introducing modern management techniques and delivering achievable solutions to the SME market place through training, implementation and coaching. Services include: strategic planning; risk analysis; sales strategies; non-financial business planning; building sustainable growth using cutting edge guerrilla marketing techniques.

Directorships of Phoenix Health Services Ltd, Memory Opticians Ltd Salisbury, TRI Health Charity, Justri HIV advisory NFP company, Garrison Girls Army Wives Charity.

2001 to 2002 **Sandpiper Services Co. Ltd - Managing Director**

- Headhunted by the Board of Directors to restructure the company from a "Family" carpet business to a corporate entity with full P&L responsibility.
- Formulated and introduced a strategy for consolidation and future growth expanding into new markets and building on current markets with planned growth in turnover from £3m to £15m in ten years.
- Introduced transparent accounting systems which enabled clear identification of costs and profits on a project basis resulting in reduced wastage and return to month on month profit

- Involved in the training and development of all 25 staff

1999 to 2000

**Tower Trading Co. Ltd - International Marketing Director**

Reporting directly to the overseas Board of Directors and the IMF representatives, re-structured a group of Ethiopian Manufacturers, funded by the World Bank, to break into world markets with a range of locally produced textile, construction and food products.

- Negotiated and opened new export & international markets in Europe and the UK
- Devised and set up an e-commerce business strategy, designing a website portal for immediate provision of quotations and a purchase point
- Established sales channels & developed contacts with new customers including Ikea, Nike, and several Japanese distributors
- Developed and implemented a strategy for the structure & management of 15 group companies leading to improved purchasing, marketing, and quality systems

1998 to 1999

**Roebuck Contracts Ltd - Director of Design & Business Development**

Appointed to start and develop a new division dealing with winning contract interior projects throughout London. Contracts included Unilever and other plc companies

- Successfully increased market awareness, meeting with potential clients, and resulting in tenders for in excess of £3.5 million in the first year
- Implemented a structure leading to recruitment of a sales team, contractors and designers

1993 to 1997

**Emtex Carpet Manufacturing Co. Ltd - Managing Director**

The first carpet manufacturer in Dubai Emtex won many prestigious projects for palace refurbishment in the Gulf and also exported product to the USA and Europe

- Negotiated with most of the Gulf's royal families providing product from Egypt, Syria to Saudi Arabia, Oman and Iran.
- Won contract to design, supply and install carpets into Sylvester Stallone's Miami home.

Pre 1993 included:

Sales & Marketing Director - Emtex, Dubai,  
 General Manager - Bremworth, Dubai,  
 Interior Designer/Contracts Manager - Alasfoor Furnishings, Oman  
 Interior Designer  
 Residential Social Worker

**QUALIFICATIONS & TRAINING**

2004            Diploma in Business Mentoring & Coaching  
 2001            **MBA** with merits  
                   University of Southampton  
 1982            **BA (Hons)** Interior Design

**PROFESSIONAL MEMBERSHIPS**

Fellow of the Chartered Management Institute  
 Fellow of the Institute of Sales and Marketing Management  
 Fellow of the Institute of Leadership and Management  
 Member of the Institute of Business Consulting  
 Member of the Chartered Institute of Marketing  
 Member of the Chartered Society of Designers  
 Member of the Strategic Planning Society

**ADDITIONAL INFORMATION**

Date of Birth: 20/09/1958

Full UK driving licence held

## Appendix C

### Franchise Area Map



# Dorset County

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Centre Easting: 375304.7  
Centre Northing: 100800.9  
Zoom: 103.78km (1:103,780)  
Date: 21/07/2014

