

DRAFT 2020 Business Planning Schedule								Rev1
ID	Task Name	Duration	Start	Finish	Resource Initials	Predecessors	Successors	
1	Start Process	0 days	Wed 5/1/19	Wed 5/1/19			2	<p>4/214/285/55/125/195/266/26/96/166/236/307/77/147/217/288/48/118/188/259/19/89/159/229/2910/610/1310/2010/2711/3111/17</p> <p>MayJuneJulyAugustSeptemberOctoberNovember</p> <p>5/15/16/196/197/37/247/318/98/198/229/209/279/2710/410/1110/1811/4</p> <p>MKTBPTAMSMTPL,SMT,MKTPL,SMT,MKTPL,MKTMKTPL,MKTMKTSMT,MKTSMTPLSMTPL,DM,SMT,AMDMSMTDM,SMTSMTHRPLAMAMAMHRAMSMIT,AMSMTPLSMTPLSMT</p>
2	Ops Team Kick-Off*	0 days	Wed 5/1/19	Wed 5/1/19	BPT	1	7FS+70 days,4	
3	Create Template Documents	72 days	Wed 5/1/19	Thu 8/8/19				
4	Annual PL Roadmap Template	11 days	Wed 5/1/19	Wed 5/15/19	MKT	2	11FS+10 days,	
5	Staffing Plan Tool	20 days	Wed 5/1/19	Tue 5/28/19	BPT	2	22	
6	Capital and Ops Template	27 days	Wed 5/1/19	Thu 6/6/19	AM	2	29	
7	Strategic Plan Review/Update	2 days	Wed 8/7/19	Thu 8/8/19	SMT	2FS+70 days	18	
8	Business Plan Report Template	27 days	Wed 5/1/19	Thu 6/6/19	BPT	2	40	
9	Business Plan Kick-off	20 days	Wed 5/1/19	Tue 5/28/19	SMT	2	22	
10	Annual Revenue Forecasting	61 days	Thu 5/30/19	Thu 8/22/19				
11	Practice Leader Training*	5 days	Thu 5/30/19	Wed 6/5/19	PL,SMT,MKT	4FS+10 days	13,12	
12	Conferences & Events	10 days	Thu 6/6/19	Wed 6/19/19	PL,SMT,MKT	11	35	
13	Update Strategic Roadmaps	10 days	Thu 6/6/19	Wed 6/19/19	PL,MKT	11,4	14	
14	Market Research Requests Due	0 days	Wed 6/19/19	Wed 6/19/19	PL	13	15	
15	Market Research	10 days	Thu 6/20/19	Wed 7/3/19	MKT	14	16	
16	Finalize Roadmaps and 90 Day Plans	15 days	Thu 7/4/19	Wed 7/24/19	PL,MKT	15	17,21,29,41,27	
17	Combine Forecast*	5 days	Thu 7/25/19	Wed 7/31/19	MKT	16	18	
18	SMT Review Meeting*	7 days	Fri 8/9/19	Mon 8/19/19	SMT,MKT	17,7	19	
19	Annual Revenue Forecasting Complete	3 days	Tue 8/20/19	Thu 8/22/19	SMT	18	40,25	
20	Staffing Plan	42 days	Thu 7/25/19	Fri 9/20/19				
21	Practice Staffing Requests	2 days	Thu 7/25/19	Fri 7/26/19	PL	16	22,23	
22	Review Staffing Plan Tool	10 days	Mon 7/29/19	Fri 8/9/19	SMT	9,5,21	24,23	
23	Identify New Staff Needs	5 days	Mon 8/12/19	Fri 8/16/19	PL,DM,SMT,AM	22,21	24	
24	Update Staffing Plan Tool	5 days	Mon 8/19/19	Fri 8/23/19	DM,SMT	22,23	25,27	
25	Compare Needs to Revenue Forecast*	5 days	Mon 8/26/19	Fri 8/30/19	DM,SMT	24,19	26,35,36,37	
26	Approved Staffing Plan*	2 days	Mon 9/2/19	Tue 9/3/19	SMT	25	40,30	
27	Individual Reviews / Goal Setting	20 days	Mon 8/26/19	Fri 9/20/19	HR	16,24	40	
28	Capital and Ops Budget	42 days	Thu 7/25/19	Fri 9/20/19				
29	Practice Capital Requests	10 days	Thu 7/25/19	Wed 8/7/19	PL	16,6	35,37	
30	Direct/Indirect Labor	4 days	Wed 9/4/19	Mon 9/9/19	AM	26	38,32,33,34,31	
31	Bonus	4 days	Tue 9/10/19	Fri 9/13/19	AM	30	38	
32	Payroll Taxes	4 days	Tue 9/10/19	Fri 9/13/19	AM	30	38	
33	Benefits	4 days	Tue 9/10/19	Fri 9/13/19	HR	30	38	
34	Profit Sharing	4 days	Tue 9/10/19	Fri 9/13/19	AM	30	38	
35	Conferences, Events, BD	10 days	Mon 9/2/19	Fri 9/13/19	SMT	25,29,12	38	
36	Rent/Utilities	10 days	Mon 9/2/19	Fri 9/13/19	AM	25	38	
37	Capital	10 days	Mon 9/2/19	Fri 9/13/19	IT,AM	25,29	38	
38	Draft C&O Plan*	0 days	Fri 9/13/19	Fri 9/13/19	AM	30,31,32,33,34,35,36,	39	
39	Final C&O Plan Approved	5 days	Mon 9/16/19	Fri 9/20/19	SMT	38	40	
40	Draft Business Plan Review Meeting*	1 day	Mon 9/23/19	Mon 9/23/19	SMT	19,26,39,8,27	42,41	
41	Roadmap Presentations*	5 days	Tue 9/24/19	Mon 9/30/19	PL	16,40	43	
42	Final Business Plan*	15 days	Tue 9/24/19	Mon 10/14/19	SMT	40	43FS+15 days	
43	Presentation / Roll Out to Staff*	0 days	Mon 11/4/19	Mon 11/4/19	SMT	42FS+15 days,41		
See Attachment 1 for Resource descriptions								Fri 5/24/19

Attachment 1

Resource Descriptions

SMT – Senior Management Team – Gayle, Mike H., JD, Jim, Clint, Kim, Mike W.

BPT – Business Planning Team – Clint, Tim Slivensky, Mike W., Cody S.

MKT – Marketing – Mike W.

DM – Division Managers – Jim, Clint

PL – Practice Leaders – Mark Ingram, Mike Heath, JD Allen, Mike Chaney, Max Proctor

AM – Admin Division – Gayle, Kim, Michelle

HR – Larry

IT – Daniel

* Meeting Required