

Schematical Advisory Quarterly/Yearly Planning

{CUSTOMER NAME}

Matt Lea - mlea@schematical.com - {DATE}

Overview:

I, Matt Lea, in an effort to give as much value to my customers as possible want to get a big picture view of the needs of the business. This allows me to **keep your bottom line top of mind** when making decisions. So I am proactively asking some questions that will allow me to better understand your needs.

Why is this necessary?

I had a client come to me and ask me to save them money on their AWS bill. After a bit of digging I found out that even if I cut 100% of their costs the company would still run out of money in 3-6 months. What they really needed was the ability to scale up to service new customers. Once I discovered that I pointed it out to them and we changed course. It is more than 9 months later as I write this and they are doing fine.

Schematical Updates:

What is going on with Schematical?

Q4- 2024 Update:

- O'Reilly Course + Additional Content
- Outbound business + Authority Building
- Advisory has been a success
- Expanding services to include Group Coaching.
- Possibly starting a Mastermind group.
- Referral program

2025 Proposal

Current State Of Your Business:

How was the past Quarter/Year?

Any big changes coming soon?

How are you currently measuring your success/failures?

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What are your biggest challenges inside of AWS/Infrastructure/DevOps?

What are your biggest challenges outside of AWS/Infrastructure/DevOps?

What are the biggest risks you see on the horizon?

Goals:

What are your goals for the next year?

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Revenue(Do we need to focus on scaling up)?

Goal AWS Spend(Do we want to try and save some more cash)?

What are your goals for the next quarter?

What metrics are you using to measure the success of these goals?

What projects/initiatives do you foresee during the next Quarter/Year?

Any new products or technologies you are looking at embracing?

Is there anything you wish we had better metrics or insight into?

Are you looking to hire any more technical or managerial talent? (I know a lot of people).

Are there any other service providers you are looking for?

Ex: SEO Help

How Can I Make The Greatest Positive Impact On Your Business?

How do you feel about our current Advisory and Oversight Service Agreement?

In the past Quarter/Year what is the most valuable contribution I have made to your business?

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Are there any ways I can improve your business?

Are there any ways I can improve my offerings to better serve your needs?

Are there any additional services outside of what I currently offer that might fit your needs?(I am expanding my network).

What is the best way, if any, for me to refer business to you and what business would you like referrals?

Are there any Nuclear/Platinum projects that might need me to go hands-on in the near future?

Next Steps:

Immediate Next Steps:

Ex: Send out invoice - Owner: Matt

Long Term Next Steps:

Ex: Feature ROI Calculation Meeting - Owner: {Project Manager}