# **Work plan**

A work plan may be useful for some advisory boards, particularly those with a business growth focus or a desire to take a structured approach and document their forward planning. Items on the work plan should be tailored to your advisory board’s purpose otherwise you run the risk of losing focus or receiving advice outside your advisory board’s scope. The work plan should be a living document and reviewed on a regular basis.

The example work plan below is for an advisory board that has a sales and marketing focus.

**Example**

Some of these work items will be relevant to your advisory board, others will not be. Work with your advisory board to put this list of work items together

Modify this to suit your advisory board’s purpose

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| Advisory board purpose – to accelerate growth (with a sales and marketing focus by x% in y period) |
| Date | Work items |
| DD.MM.YY | * Review status of business and current revenue generating activities
* Focus on key opportunities to confirm the present strategic plan in regard to sales and marketing.
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| DD.MM.YY | * Confirm focus on partner versus direct sales
* Workshop useful indicators to measure progress.
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| DD.MM.YY | * Provide advice on strategies for personnel sourcing and remuneration.
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| DD.MM.YY | * Review partner feedback as to opportunity for new modules
* Review partner feedback as to opportunity for new markets.
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| DD.MM.YY | * Strategy session on preferred new module or market
* Review advisory board performance, priorities and composition.
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