

form  
&  
found

*Services &*  
Investment  
Guide

Helping businesses find their form.

*For founders, business owners and leadership teams.*



# Why Form & Found



People | Operations | Growth  
Proudly based in Regional Australia.

## **From the outside, your business probably looks successful.**

But as they've grown so have the challenges.

Every important decision still comes through you.

Your managers rely on you instead of making decisions themselves.

Your team is working hard, but they're not always pulling in the same direction.

Simple processes have now become complicated.

Growth has created more pressure instead of more freedom.

Taking a holiday feels impossible because you're worried everything will stop without you.

## **If you're nodding, you're not alone.**

These challenges rarely happen because people aren't capable. More often, they're a sign your business has outgrown the systems, structure and leadership that once supported it.

That's where Form & Found comes in.

I partner with business owners and leadership teams to identify what's getting in the way, strengthen the foundations of their business and implement practical improvements that create lasting change.

The result?

Stronger leaders.

Better systems.

Clearer accountability.

A team that knows what's expected.

And a business that can continue growing without relying on you for every decision.

Because real growth isn't about doing more. It's about building a business that's stronger, more scalable and built to thrive beyond its owner.





# Why Businesses Choose Form & Found

Over the past 15 years working inside growing professional services businesses, I've led operational improvement, business development and organisational change. That experience means I understand the challenges that come with growth because I've been responsible for solving them from within the business, not advising from the sidelines.

I've never been the consultant who walks in, writes a report and walks away. I've been the person responsible for making the changes happen.

That experience has included:

## **Building Stronger Leadership & Teams**

- Redesigned organisational structures, reporting lines and team responsibilities to improve accountability and support confident decision making.
- Developed practical performance frameworks, policies and standard operating procedures that improved consistency across teams.

## **Strengthen Operations & Business Performance**

- Led the implementation of new business systems, consolidating multiple software platforms into one and reducing administration, software and accounting costs.
- Worked alongside accountants to develop operational budgets, financial forecasts and identify opportunities to improve business performance.

## **Supporting Sustainable Business Growth**

- Planned and delivered marketing and community initiatives that increased brand awareness and supported regional growth.
- Co-founded and Delivered The Flourish Forum, bringing together more than 200 businesswomen through sponsorship, stakeholder engagement and strategic event delivery.

Real business improvement isn't about creating bigger reports or more complicated processes. It's about giving business owners the confidence that their people, systems and operations can support growth long after the project is complete.

That's the approach I bring to every engagement. Practical, collaborative and focused on building businesses that become stronger, more capable and less reliant on the owner.

## Business Foundations Review

**If your business feels harder to run than it should, this is where we start.**

Every decision still comes through you. Your managers need more direction than you'd like. Your team is working hard, but you're not seeing the results you expected.

When you're this close to the business every day, it's hard to see clearly what's really getting in the way. The Business Foundations Review is a comprehensive, independent assessment designed to uncover what's working well, what's holding your business back and where your greatest opportunities for improvement lie.

Whether you're planning for growth, struggling with inefficiencies or simply know your business could be operating better, this review gives you the clarity and direction needed to move forward with confidence.

### **What We'll Review**

We'll take a holistic view of your business to understand how your people, systems and processes work together, including:

- Business goals, priorities and key challenges
- Operations, systems and workflows
- Leadership capability, team structure and accountability
- Policies, procedures and governance
- Customer experience and service delivery
- Business performance, growth priorities and marketing activity
- Customer journey and opportunities for improvement

### **What You'll Receive**

At the conclusion of the review, you'll receive:

- A comprehensive Business Assessment Report
- An Executive Summary highlighting your key findings
- Prioritised opportunities for improvement
- Practical recommendations tailored to your business
- A customised 90-day Action Plan
- A presentation of findings and recommended next steps

You'll leave with a practical roadmap that identifies your highest priorities and the actions needed to build a stronger, more efficient and less owner-dependent business.

### **Investment**

\$2,750

Ideal for growing businesses seeking clarity before investing in change.

Includes discovery, business assessment, findings presentation and a tailored 90-day roadmap.

### **Already know where you need help?**

If you've already identified a specific challenge or project, Implementation Projects can be scoped as standalone engagements tailored to your business.



# Implementation Projects

## Turning recommendations into results.

Identifying what's holding your business back is only the beginning.

Real improvement happens when practical changes are put into action.

Whether you've completed a Business Foundations Review or already have a clearly defined project, I work alongside business owners and leadership teams to plan, coordinate and deliver business improvement projects that strengthen the way their business operates.

Every project is individually scoped and tailored to your business, priorities and desired outcomes.

## How We Can Strengthen Your Business

### Leadership & Organisational Effectiveness

- Clarifying team structures, roles and responsibilities
- Strengthening accountability across your team
- Improving communication and decision making
- Developing practical performance frameworks

### Systems & Operational Excellence

- Business systems implementation and optimisation
- Business process and workflow improvement
- Standard Operating Procedures (SOPs)
- Governance, reporting and operational documentation

### Marketing & Business Growth

- Marketing strategy and planning
- Brand positioning and messaging
- Business development, referral and partnership strategies
- Customer experience and client journey improvement
- Client retention strategies
- Growth initiatives that support sustainable business development

### Business Planning

- Operational budgeting and forecasting
- Identifying opportunities to improve efficiency and reduce unnecessary costs
- Supporting strategic planning and operational decision making



# Implementation Projects

*I focus on business operations, leadership and growth, and work best in partnership with the specialists already around your business. Where legal, HR or financial advice is needed, I'll work alongside your existing advisors, or connect you with someone I trust.*

Every project includes:

- Clearly defined scope of work and agreed outcomes
- Project leadership, practical implementation and hands-on support
- Regular collaboration with you and your leadership team
- Tools, templates and documentation where required
- A final review with recommendations for continued improvement.

## **Investment**

Choose your focus — leadership, systems, marketing, business growth or business planning, each project scoped to your business and priced accordingly.

From \$3,500

Following your Business Foundations Review, you'll receive a tailored proposal outlining the recommended scope of work, deliverables, investment and estimated timeframes before any work begins.

If you've already identified a specific priority or project, a tailored proposal can also be developed without completing a Business Foundations Review.

The goal isn't simply to improve how your business operates today. It's to build the systems, structure and leadership capability that allow your business to continue growing with greater confidence and less reliance on the owner.

# Ongoing Partnership

## **Because building a stronger business doesn't end with one project.**

Every business continues to evolve. New opportunities emerge. Priorities shift and new challenges arise.

Following a Business Foundations Review or Implementation Project, an Ongoing Partnership provides continued support to keep priorities moving, address emerging challenges and build on the improvements already underway.

### **Your Partnership Includes**

Every partnership is tailored to your business and may include:

- Business improvement planning
- Operational advice and problem solving
- Review and refinement of systems, processes and documentation
- Leadership and operational advice as new challenges arise
- Progress reviews and priority planning
- A brief written summary on action list after each session
- Guidance on implementing agreed business improvement initiatives

### **What You'll Gain**

- An experienced partner who understands your business
- Practical advice grounded in real operational experience
- Continued momentum on your highest priorities
- Greater accountability around agreed business improvement priorities

### **Investment**

From \$2,000

*Minimum three-month engagement.*

Ongoing Partnerships are individually scoped based on your business, priorities and the level of support required.

Your partnership will include an agreed schedule of business improvement meetings, progress reviews, priority planning and support between sessions.

Where a new priority requires substantial implementation work or falls outside the agreed partnership scope, a separate Implementation Project may be recommended.

### **The Outcome**

Continued momentum on the improvements that matter most, with a trusted partner who understands your business and can help you strengthen operations, support leadership and reduce reliance on the owner as your business evolves.



# The Form & Found Method

Whether you're engaging Form & Found for a Business Foundations Review, a specific implementation project or ongoing support, this approach guides the way we work together.



## Understand

We uncover what's working, what's getting in the way and where the biggest opportunities for improvement lie.

*(Business Foundations Review)*

## Strengthen

Build stronger foundations across your people, operations and customer experience.

This is where we implement practical improvements that make your business easier to run.

*(People & Culture • Operational Excellence • Customer Experience)*

## Grow

Align your strategy, priorities and systems to support sustainable growth.

Growth shouldn't create more chaos, it should create more opportunity.

*(Marketing & Business Growth)*

## Evolve

Improvement doesn't stop after implementation.

Through ongoing partnership, we continue refining, supporting and strengthening your business as it evolves.

*(Ongoing Partnership)*

*Real improvement doesn't happen after one meeting or one report.*

*It happens through consistent action, practical support and ongoing accountability.*

*Whether we're working together for a single project or through an ongoing partnership, my commitment remains the same:*

***To leave your business stronger than when we found it.***



# Let's Start the Conversation

You don't need to have all the answers before reaching out.

Sometimes all it takes is a fresh perspective, an honest conversation and a practical plan to move forward with confidence.

Whether you're facing a specific challenge or simply know your business could be stronger, Form & Found is here to help.

***Let's leave your business stronger than we found it.***

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