Balloon 2019 Strategic plan

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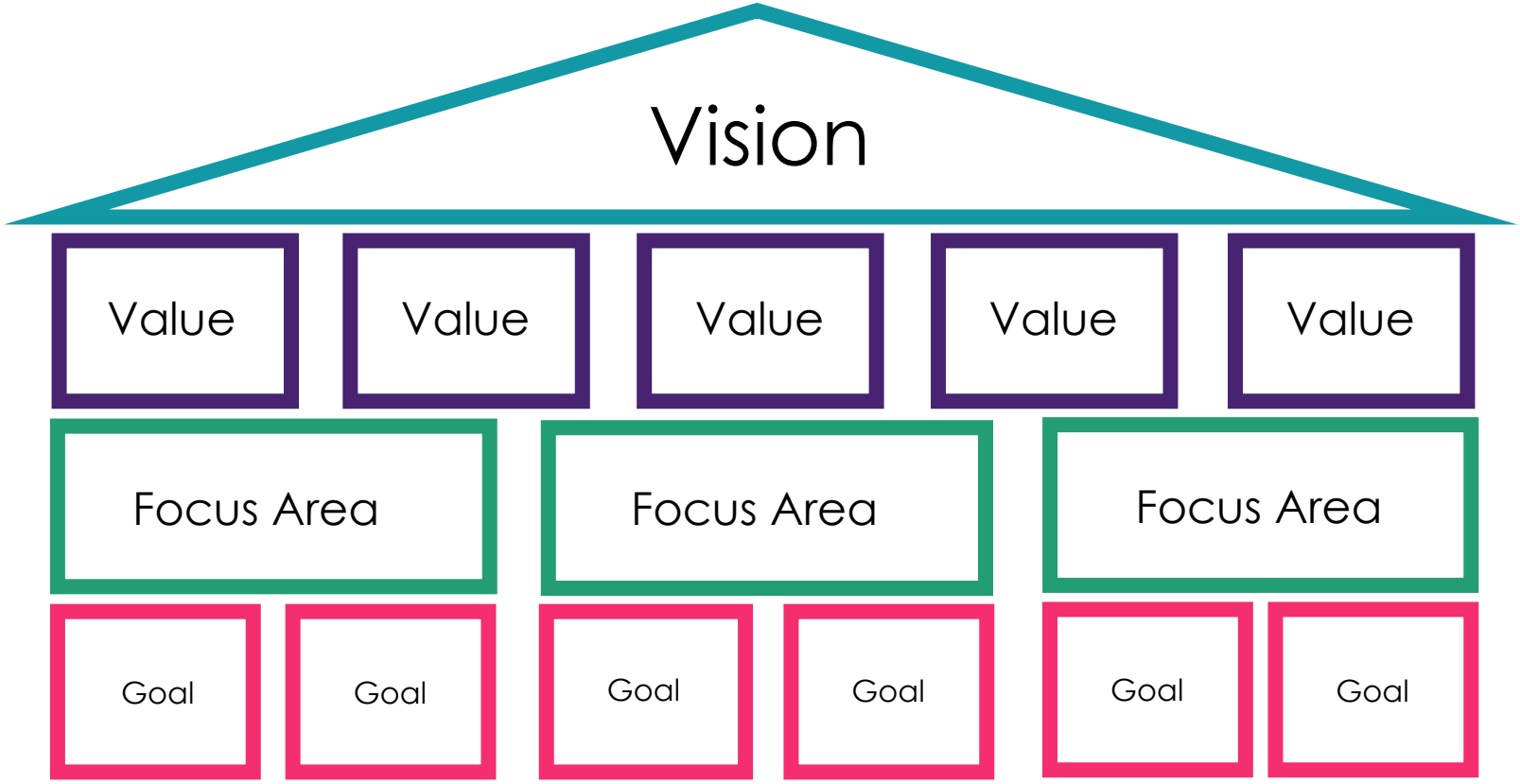
Overview



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Vision – why bother?

It's the anchor that stops us getting lost at sea

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Vision – the why

Balloon exists to capitalise and grow high potential small businesses.

We believe every small business that can grow, should grow.

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Vision – the "why" explained

For us, businesses that *can grow* have more than just good fundamentals. They are driven forward by brilliant, dependable leaders who are deeply committed to realising growth.

And *growth* goes way beyond the bottom line. It means providing good quality jobs that are attractive and attainable for vulnerable and marginalised people.

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Vision - statement

Our vision is 3.5 million high potential small businesses in sub-Saharan Africa accessing the products and services they need to grow, tackling poverty in their communities by creating good quality jobs where they're needed most.

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Therefore…

Balloon Capital exists to capitalise and grow high potential small businesses.

We believe every small business that can grow, should grow.

For us, businesses that *can grow* have more than just good business fundamentals. They are driven forward by brilliant, dependable leaders who are deeply committed to realising growth.

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Values – why bother?

Should be **critical** enablers of Vision, combining aspiration with pragmatism.

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Invention

We constantly seek to improve the way that Balloon works. We learn from experience, analyse what is and isn't working, and invent new solutions based on evidence.

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Professionalism

We present a highly professional image to our beneficiaries through appearance, manners and communication in every interaction.

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Excellence

We are proud of what we do and the scale of our ambition. We insist on the highest possible standards because realising our Vision will transform the lives' of millions of people.

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Teamwork

We find time to build a better team. We respect and value peers and strive to create a happy and supportive environment. Leaders share experiences to grow the knowledge and capacity of the whole.

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Accountability

We take full responsibility for our actions, errors and commitments, and expect every partner to do the same.

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Focus Areas and Goals – why bother?

Without them, we have no **foundation** on which to build the plan

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Focus Areas

Product Development	**100% Sustainability**	**Process refinement**
Impact	**Risk Management**	**Team and Culture**

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Focus and Goals #1

Product Development	• **Define product range** by end Q1

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Focus and Goals #2

100% Sustainability

- **Increase revenue to 50% of monthly costs** by end Q4
- **Raise £200,000** of grant funding by end Q4
- **Comply with budget targets** for four consecutive quarters

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Focus and Goals #3

Process Refinement	• **Create first version of playbook** by end Q2 • **Roll out global KM System** by end Q2

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Focus and Goals #3

Team and Culture	• **Achieve optimal staff team** by end Q2 • **Adopt uniform PM System** by end Q1 • **Create training and development plan** for staff by end Q3 • **Develop incentive package** for staff by end Q1

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Focus and Objectives #3

Impact	• **Comply with all donor reporting** requirements • **Create 200 good jobs in investee companies** by end Q4 • **Improve job quality score** in 100% of businesses • **Grow investee revenue** faster than projections

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Focus and Objectives #3

Risk Management	• **Implement Risk Policy** by end Q1

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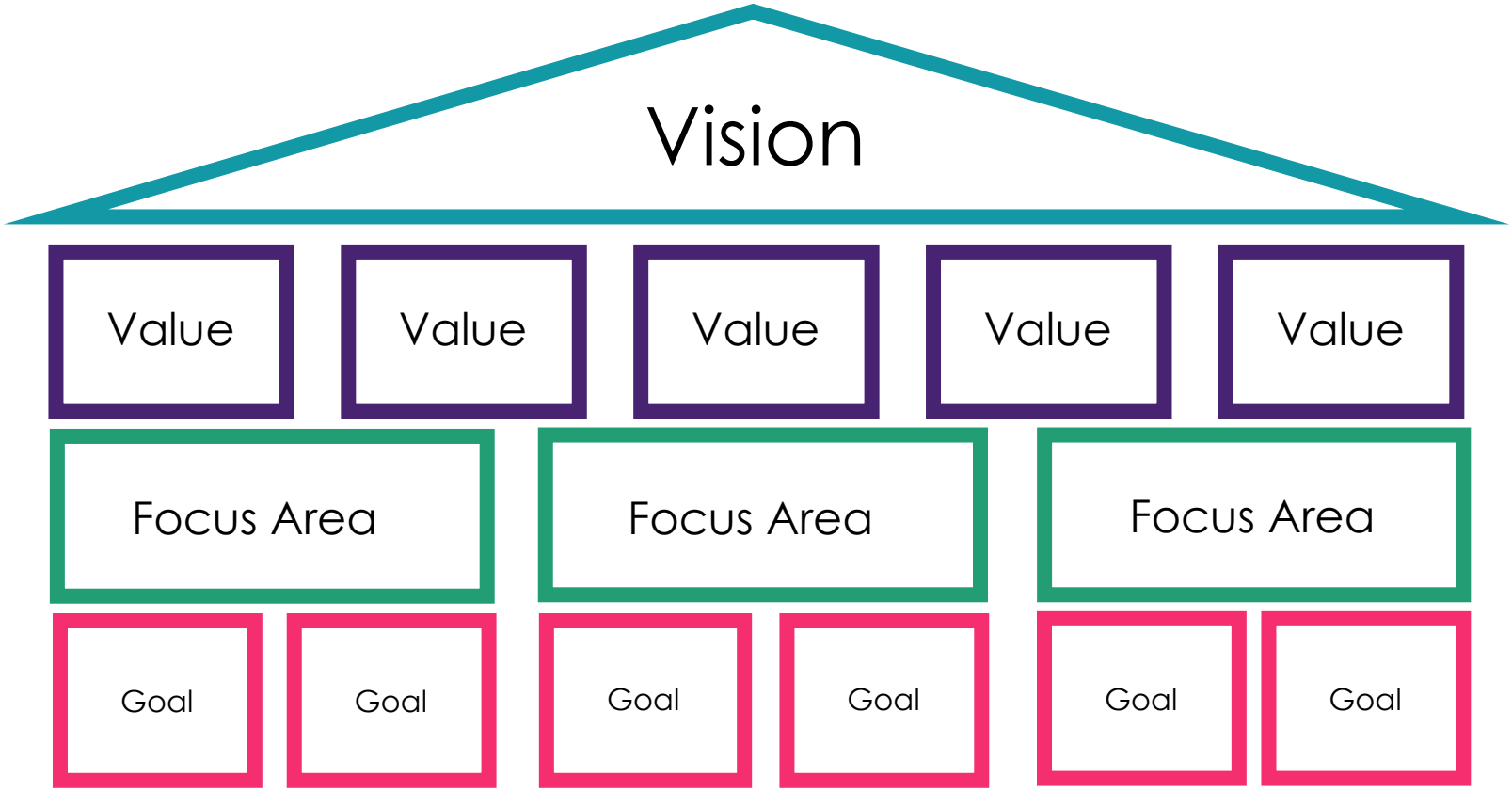
Therefore…



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…our 2019 Strategic Plan

Vision

Our vision is...
3.5 million high potential small businesses
in sub-Saharan Africa accessing the products and services they need
to grow, tackling poverty in their communities by creating good quality jobs where they're needed most.

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Focus Areas	Goals
Product Development	I. Define product range by end Q1
100% Sustainability	I. Increase revenue to 50% of monthly costs by end Q4 II. Raise £200,000 of grant funding by end Q4 III. Comply with budget targets for four consecutive quarters
Process Refinement	I. Create first version of playbook by end Q2 II. Roll out global KM system by end Q2
Team and Culture	I. Achieve optimal staff team by end Q2 II. Adopt uniform PM system by end Q1 III. Create training and development plan for staff by end Q3 IV. Develop effective incentive package for staff by end Q1
Impact	I. Comply with all donor reporting requirements II. Create 200 good jobs in investee companies by end Q4 III. Improve job quality score in 100% of businesses IV. Grow investee revenue faster than projections
Risk Management	I. Implement Risk Policy by end Q1

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Strategy reporting

How Often: Quarterly cycle

When: Beginning of third week of the month

Who: Trustee rep., CEO, COO, Finance Manager, Country Directors

What: Fixed agenda and reporting format shared by end of Q1

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