

Take a moment, have a cuppa
and get planning!

Setting your Goals 1, 5 and 10 year plan

Your company name Cambridge Payroll

GOALS	YEAR 1	YEAR 5	YEAR 10
What is my office structure?	One rented office in Pampisford	Purchased our own office building, south cambridge, peaceful views, good parking. Rent a space to another company	In same building but no longer need to rent out a space
How many employees are there and what roles do they cover?	(4) 1 x Payroll Manager - 1 x trainee accountant - 1 x Bookkeeper - 1 x apprentice	(8) 1 x Payroll Manager - 1 x Payroll Assistant - 1 x Accountant - 1 x Trainee accountant - 1 x Bookkeeping Manager - 1 x Bookkeeper - 1 x Apprentice - 1 x credit controller	(13) 1 x Payroll Manager - 2 x Payroll Assistants - 2 x Accountants - 1 x Trainee Accountant - 1 x Bookkeeping Manager - 2 x Bookkeeper - 1 x Apprentice - 2 x credit controller - 1/2 x HR - 1/2 x Marketing
How many clients do I have?	60	135	210
What services do I offer?	Payroll, Bookkeeping, Self-Assessment Tax Returns, VAT Returns	Payroll, Bookkeeping, Self-Assessment Tax Returns, VAT Returns, P11ds, Year end accounts (sole trader & Limited Company), Registered Office, Annual Returns	Payroll, Bookkeeping, Self-Assessment Tax Returns, VAT Returns, P11ds, Year end accounts (sole trader & Limited Company), Registered Office, Annual Returns
What is my annual turnover?	157k	350k	550k
What is my profit percentage?	10%	15%	20%

GOALS

Tailor these to your own company structure.
What are the things that you can grow?
What are things that you can improve on?
What do you want to be known for?

YEAR 1

Realistically note down where you want to be at the end of this year.
Dream big, but keep it realistic.
Look back at previous trading years.
Research other similar companies and structures.
Talk to friends and family - feedback is always welcome!

YEAR 5 & 10

Again, dream big but don't be unrealistic.
Base your growth on year 1 and logically work your way up.
Really think about what you want to become - remember you have a private life too. Does that fit in to your long-term plans?