

Business Roadmap Advisory Service

The Business Roadmap Advisory helps organisations navigate growth, transition or change with clarity, control and confidence.

We align strategy, structure, people and systems into a clear, actionable roadmap that drives disciplined execution, accountable ownership and measurable progress toward long-term goals.

Key Details

DURATION: 8–16 Weeks

INCLUSIONS:

- Discovery Session
- Organisation Diagnostic & Mud Map
- Business Roadmap
- Implementation Plan

DELIVERY: Online, In-Person or Hybrid

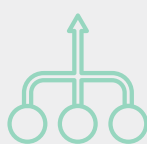
Overview

This service is designed to create a roadmap that enables organisations to move decisively toward one of four strategic outcomes:



GROWTH

We help define growth pathways, resource requirements and sequencing so expansion is structured, strategic and commercially sustainable.



CONSOLIDATION

For companies stabilising after rapid growth or change. We refine operating rhythm, streamline systems, align structure to workload and reset priorities to strengthen the foundation before further scaling.



SALE / DIVESTMENT PREPARATION

For organisations preparing to sell or exit. We establish governance, clarify processes, reduce dependency risk and position the business for valuation uplift by ensuring it can run without key individuals.



SUCCESSION PLANNING

For leadership transition, particularly in founder-led or family businesses. We build capability, define decision rights, create accountability frameworks and prepare the next generation to lead with confidence and strategic discipline.

Our Process

A structured three-phase methodology that guides leaders from insight to execution.

Each stage builds clarity, alignment and operational confidence, resulting in a roadmap that is realistic, actionable and capable of driving measurable business outcomes.

EXPECTED OUTCOMES

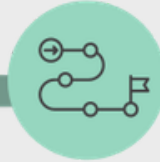
- Aligned leadership team with shared direction and priorities
- Clear organisational structure and accountability framework
- Defined strategic goals and measurable success indicators
- Practical roadmap to guide decision-making and growth over the next 12–24 months



PHASE 1

Discovery

- Strategic discovery tools and leadership interviews
- Capability and performance insights
- Market and operational context
- Goal alignment and direction clarity
- Priority definition and success measures



PHASE 2

Diagnosis

- Opportunity and risk analysis
- Systems, structure and capability mapping
- Barriers to growth identified
- Strategic choice points and required actions
- Sequenced pathway toward outcome



PHASE 3

Transformation

- Roadmap developed into actionable delivery plan
- Timelines, responsibility and resource clarity
- Initiatives structured for measurable impact
- Implementation support across Strategy, Leadership, People, Operations, Marketing and Sales
- Progress markers and accountability structures

Ready to take the next step?

Let's talk about how our Business Roadmap Advisory Services can support your organisation and its people. Contact us to arrange an initial conversation and explore the right approach for your context:

02 9197 8699 | info@epiphanytraining.com.au



Board Advisory Services

Our Board Advisory Services are designed to strengthen governance, sharpen strategic direction and support leadership teams with the right structure and expertise to guide sustainable growth.

Whether you need independent oversight, advisory input or assistance establishing the right board composition, we provide tailored solutions that align with your organisation’s stage and goals.

Governance Structure Assessment

We review your current operating model to define the board structure required for compliance, effective governance and confident decision-making. Suitable for organisations creating a board for the first time or evolving an existing structure.

and Board Advisory and Meeting Facilitation

We facilitate board meetings, strengthen reporting frameworks and embed governance rhythms that support high-quality decision-making. Suitable for organisations building board capability or improving current functionality.

Board Recruitment Services

We identify, assess and place non-executive board members aligned to organisational needs. This includes specialist appointments to close compliance gaps or support industry-specific growth.

Board Member Coaching and Mentoring

A development pathway for new or existing board members to strengthen leadership effectiveness, governance literacy and contribution to board performance.

PROCESS

1. Consultation and Structure Review
2. Findings and Recommendation Report
3. Board Composition Paper Delivered

PROCESS

1. Consultation and Structure Review
2. Commend sitting as Advisory Board Member
3. Implement, Monitor and Improve Reporting and Decision Systems

PROCESS

1. Define Board Requirements and Role Profile
2. Recruit and Shortlist Candidates
3. Appointment and Onboarding

PROCESS

1. Identify Development Needs and Capability Focus Areas
2. Create Coaching or Mentoring Plan
3. Deliver Ongoing Sessions and Review Progress

DURATION

4 to 8 weeks

DURATION

Minimum 3 to 6 months, with ongoing support available

DURATION

Approximately 4 to 12 weeks depending on complexity

DURATION

Initial 4-week establishment period followed by monthly sessions

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Strategic Planning Workshops



The Strategic Planning Workshop brings your leadership team together to create clarity, shared purpose and a unified direction for the organisation.

Through facilitated, structured sessions we help leaders align around goals, strengthen collaboration and convert high-level vision into focused, actionable priorities.

Key Details

DURATION: 1-3 days depending on scope and readiness

DELIVERY:
Online, In-Person or Hybrid

INCLUSIONS:

- Discovery Conversation
- Facilitated Workshop
- Summary report of strategic focus areas and next steps for implementation
- Optional follow-up consultation to support execution and accountability

Overview

This workshop is designed for organisations seeking the following outcomes:



ALIGNMENT

For leadership teams needing clarity on current state, strategic priorities, opportunities and barriers. Suitable where decision makers are not yet aligned on direction and require shared understanding before planning.



STRATEGIC GOALS

For organisations with alignment already in place and ready to define goals for the next three, five or ten years. This creates focus, direction and future-state ambition.



STRATEGIC PLAN For businesses

with alignment and goals established and now ready to build a practical strategic plan with sequencing, accountability and execution pathways.

Our Process

Our workshop process is intentionally structured to move leaders from conversation into clarity, and from clarity into commitment and action.

Our approach starts with a clear understanding of where your leadership group is today, allowing us to design a session flow that is relevant, practical, and fit for purpose.



PHASE 1

Discovery

- Clarify current performance, context & operating environment
- Identify priorities, opportunities & friction points
- Establish what success looks like for the team and organisation



PHASE 2

Workshop Design

- Workshop length, depth and structure
- Agenda tailored to pace, capability and appetite for strategic work
- Design ensures discussion is productive, inclusive and future-oriented



PHASE 3

Facilitated Sessions

- Alignment built through structured, guided conversation
- Barriers and opportunities analysed openly and constructively
- Strategic priorities and direction shaped by shared agreement



PHASE 4

Strategic Planning Report

- Outcomes captured clearly
- Actions, responsibilities & timeframes defined
- Recommendations recorded for leadership follow-through
- A roadmap you can execute

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Bespoke Strategic Services Packages

Overview

Every organisation has a unique journey. If your needs do not sit within a standard service or you require a blended approach, we will build a tailored solution that reflects your goals, structure and stage of growth.



WHAT IT IS

- Discovery and scoping conversations to understand priorities, challenges and desired outcomes
 - A tailored growth pathway designed around your people, leadership dynamic and business needs
 - Access to a suite of strategic planning, leadership development and organisational capability services
- Ongoing coordination, facilitation and documentation to ensure clarity, traction and measurable progress



WHO IS THIS FOR

Designed for businesses that need a solution built specifically around their challenges, priorities and growth goals.

Key Details

DURATION: Designed to be fully flexible, supporting everything from short, focused work to sustained long-term partnerships.

INCLUSIONS:

- Tailored Strategic Services

Package pathway outlining recommended project plans and inclusions

- Optional ongoing advisory or coaching support to embed outcomes

DELIVERY: Online, In-Person or Hybrid

Our Process

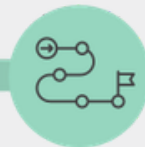
Whether you are seeking a complete strategic roadmap, targeted leadership support or ongoing advisory partnership, we design an approach that fits your business and moves you forward with clarity and confidence.



PHASE 1
We begin by gaining a clear understanding of your organisation including priorities, challenges, opportunities and context.



PHASE 2
We design a tailored solution that integrates the right support from strategic planning and board advisory to leadership coaching and succession development.



PHASE 3
We build an implementation pathway around your capacity and pace, aligning timelines, milestones and outcomes to ensure change is practical, achievable and sustained.

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