Dawgen GLOBAL

2026 EDITION



Dawgen Global illustration

SERVICE BROCHURE · GROWTH & RECOVERY

Business Advisory & Strategy

Clear strategy. Practical plans. Measurable results.

Strategic planning, performance improvement and business planning for Caribbean owners, boards and leadership teams.

SET THE DIRECTION. BUILD THE PLAN. DELIVER THE RESULTS.

01 · THE BUSINESS ISSUE

Growth needs a plan, not just ambition.

Caribbean businesses face small home markets, rising costs, foreign-exchange pressure and fast-changing technology. The organisations that grow are the ones with a clear strategy and the discipline to carry it out.

Costs are rising

Energy, shipping, wages and compliance costs keep climbing, squeezing margins unless processes and pricing are managed actively.

Markets are small

Growth often means new territories, new products or new channels, each with its own risks and investment needs.

Technology is reshaping competition

Digital channels, automation and AI are changing customer expectations and cost structures in every sector.

Plans are not carried out

Many strategic plans are written, approved and filed. Without measures and owners, little changes.

SIGNS YOU NEED OUTSIDE PERSPECTIVE

- Revenue growing but profit flat or falling
- No written strategy, or one that is out of date
- Decisions made on instinct rather than data
- Lenders or investors asking for a business plan
- Leadership team pulling in different directions
- Expansion plans without a clear business case

> **Strategy is only useful when it changes what people do on Monday morning. We build plans that can be carried out and measured.**

02 · OUR SERVICES

Advice that turns into action.

We work with owners, boards and leadership teams on the decisions that shape the business, and stay to help carry them out.

Strategic planning

A clear direction and the plan to get there.

- Strategy workshops and retreats
- Three- to five-year strategic plans
- Balanced scorecards and KPIs

Business plans & projections

Plans that lenders, investors and regulators accept.

- Business plans for finance and licences
- Financial projections and models
- Feasibility studies

Performance improvement

More margin from the business you already have.

- Process and cost reviews
- Cost to serve analysis
- Pricing and profitability reviews

Growth & market entry

Expansion with a clear business case.

- New territory and market assessments
- Group and operating structures
- Partner and channel strategies

Organisation & change

The structure and people to deliver the plan.

- Organisation design
- Change management
- Leadership team alignment

WHO WE WORK WITH

Owner-managed and family businesses · regional groups · statutory bodies · credit unions and financial institutions · tourism, manufacturing, distribution and services companies · start-ups seeking funding.

Turnaround and restructuring are covered in our separate **RECOVER Framework** brochure.

03 · OUR APPROACH

From insight to implementation.

Our advisory work is process-driven. We agree the questions, scope and timetable at the start, use your data to test options, and stay involved until the plan is under way.

01

Listen and diagnose

Interviews with owners, directors and managers, a review of performance data and a look at your market and competitors.

02

Frame the choices

We set out the realistic options, with the numbers, risks and resources behind each one.

03

Decide together

Facilitated workshops help the board and leadership team agree priorities and targets.

04

Build the plan

Each priority gets an owner, a budget, milestones and measures of success.

05

Support delivery

Regular reviews track progress, solve problems and keep the plan on course.

WE OWN THE WORK

We complete the agreed work, then train your team to sustain it. We do not hand over a report and walk away.

TOOLS WE USE

- Market and competitor analysis
- Financial modelling and scenarios
- Balanced scorecard
- Process and cost to serve mapping

INTEGRATED EXPERTISE

Tax, technology, HR and finance colleagues join when the plan needs them.

Business plans that win approval.

Banks, investors, regulators and boards need to see a credible plan before they commit. We prepare business plans and financial projections that answer their questions before they ask them.

For finance

Plans and projections that support loan and investment applications.

For licences

Business plans that meet regulators' application requirements.

For boards

Investment cases and feasibility studies for major decisions.

HOW WE BUILD A PLAN

01 **Gather**

Market, operating and financial information collected.

02 **Model**

Projections built with clear, tested assumptions.

03 **Stress test**

Scenarios show what happens if conditions change.

04 **Present**

A plan and model you can explain and defend.

WHAT A STRONG PLAN INCLUDES

- Market and competitor analysis
- Operating and staffing plan
- Three- to five-year projections
- Funding needs and returns

MODELS YOU KEEP

Financial models are handed over with guidance, so you can update them as the business changes.

05 · PERFORMANCE IMPROVEMENT

Find the margin hiding in your operations.

Many businesses do not know which customers, products or channels truly make money. Our performance reviews show where value is created and where it leaks away.

Cost and process

Doing the same work at lower cost.

- Process mapping and redesign
- Cost to serve by customer and channel
- Procurement and supplier review
- Automation opportunities

Revenue and pricing

Earning more from what you sell.

- Product and customer profitability
- Pricing reviews
- Sales pipeline and channel review
- Working capital improvement

TYPICAL RESULTS CLIENTS LOOK FOR

Higher margins

Clear actions to raise gross and operating margin.

Better cash flow

Faster collections and lower inventory without hurting service.

Clearer decisions

Management reports that show what drives performance.

> **The fastest profit improvement usually comes from understanding the business you already have, before looking for new business.**

06 · WHO SHOULD CONSIDER THIS SERVICE

For leaders ready to shape what comes next.

Owners and family businesses planning the next stage of growth

Boards needing a refreshed strategic plan

Businesses seeking finance needing a credible business plan

Regional groups expanding into new territories

Statutory bodies preparing corporate plans for ministries

Leadership teams facing falling margins or rising costs

07 · ILLUSTRATION

A family business and a stalled growth plan

Situation. A family-owned manufacturer had grown sales for several years, but profits had not followed. The owners wanted to expand into a second territory and needed bank finance.

Our work. We analysed product and customer profitability, identified loss-making lines, ran strategy workshops with the family and managers, and prepared a business plan with projections for the bank.

Outcome. The business dropped two loss-making product lines, raised prices on others and secured finance for the expansion. Quarterly reviews now track progress against the plan.

Anonymised composite illustration based on regional experience.

WHAT YOU RECEIVE

- Diagnostic findings and options
- Strategic or business plan
- Financial projections and model
- KPIs and balanced scorecard
- Implementation roadmap with owners
- Quarterly progress reviews

08 · ENGAGEMENT OPTIONS

Choose the support you need.

Strategic planning

Workshops, strategic plan and scorecard for the board.

Business plan and projections

For finance, licences, investors or board approval.

Performance review

Cost, process, pricing and profitability analysis.

Implementation support

Regular progress reviews and change support.

Fees are tailored to each organisation and agreed in the engagement letter once scope and deliverables are confirmed.

WHY DAWGEN GLOBAL

- **Caribbean insight.** Over 24 years serving Caribbean business.
- **One desk, 35 territories.** Centrally managed from our Caribbean headquarters.
- **Integrated expertise.** Audit, tax, technology, HR and legal specialists on call.
- **We own the work.** We complete it, then train your team.

09 · START HERE

- Request a business advisory proposal
- Book a strategy conversation with our team
- Ask about a business plan for finance or a licence

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