



Core Strategy
2019-2024

JON McDERMOTT

Chief Executive

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When I set up Town Planning Expert in 2012 with Keith Oliver we worked hard to grow from a single practice consultancy with just two planners to a multidisciplinary group providing pragmatic and thought provoking planning consultancy and education. This is added to in 2019 as the Group embarks on its first of many developments.

2019 is our seventh year in practice and it is time to set a new 5 year vision for how we want the group to develop and grow between 2019 and 2024. Like true planners our Core Strategy will set a roadmap for how the business will develop and the direction it will go in. It has been informed by all of our staff and stakeholders in order that everyone can understand and work towards our shared vision.

At the end of this plan period we want Town Planning Expert to be the go-to consultancy and the go-to planning education provider for new and experienced developers. In addition we want TPX to have an active development portfolio and a rewarding affiliate programme so that people who want to access the group can and whatever level they wish.



Jon McDermott
Jonathan McDermott
CX - Town Planning Expert

THE GROUP TODAY

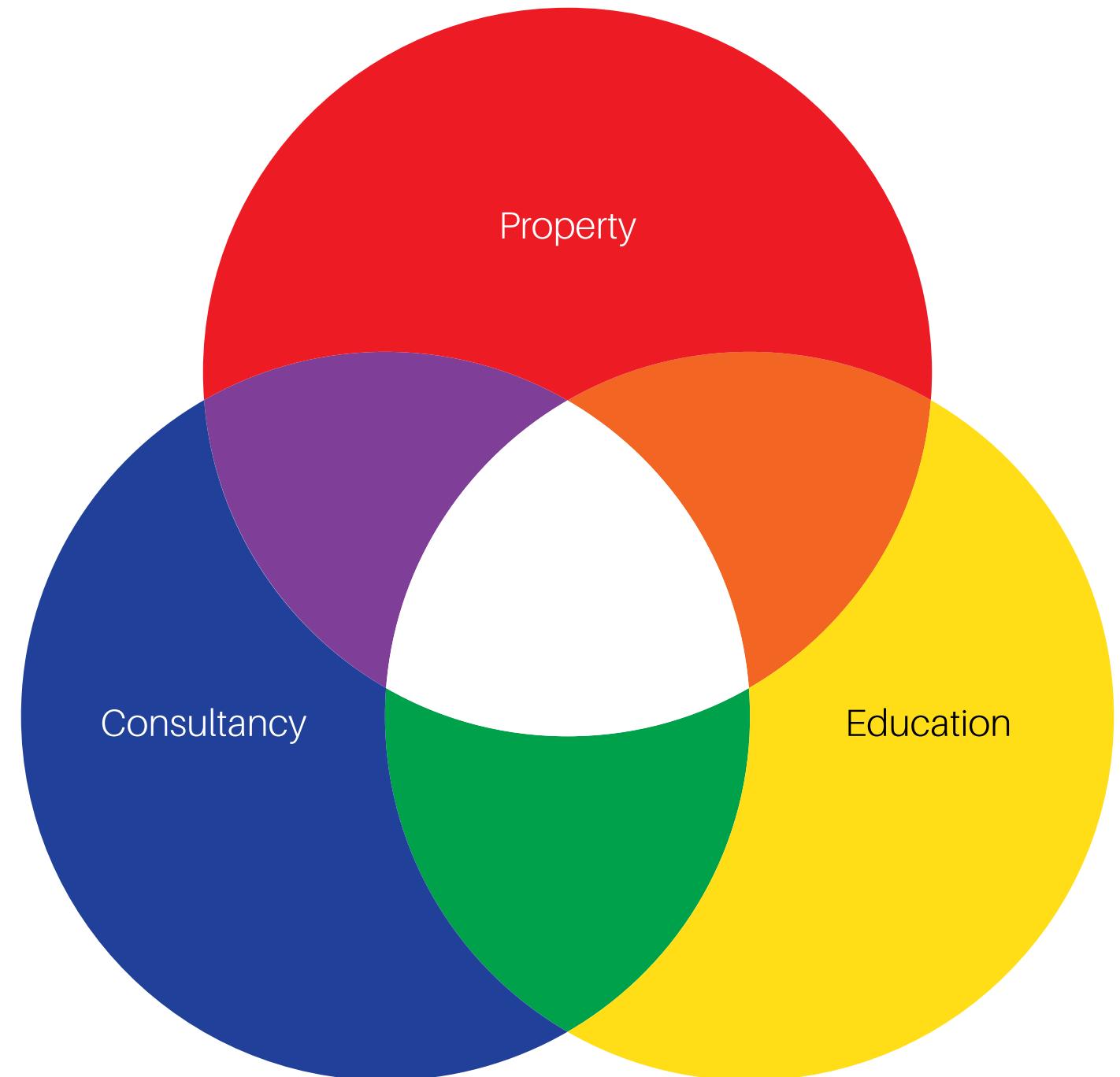
The group today is split into three distinct practice areas. These are three distinct companies that have grown organically as the need and business case has arisen for them. The companies are presently:

RP(UK) Ltd (Trading as Town Planning Experts)

TPX Education Ltd

TPX Development Holdings Ltd

Under these are the subsidiaries and special purpose vehicles that have been formed to address a certain need or to spin off part of the business into a self contained vehicle.

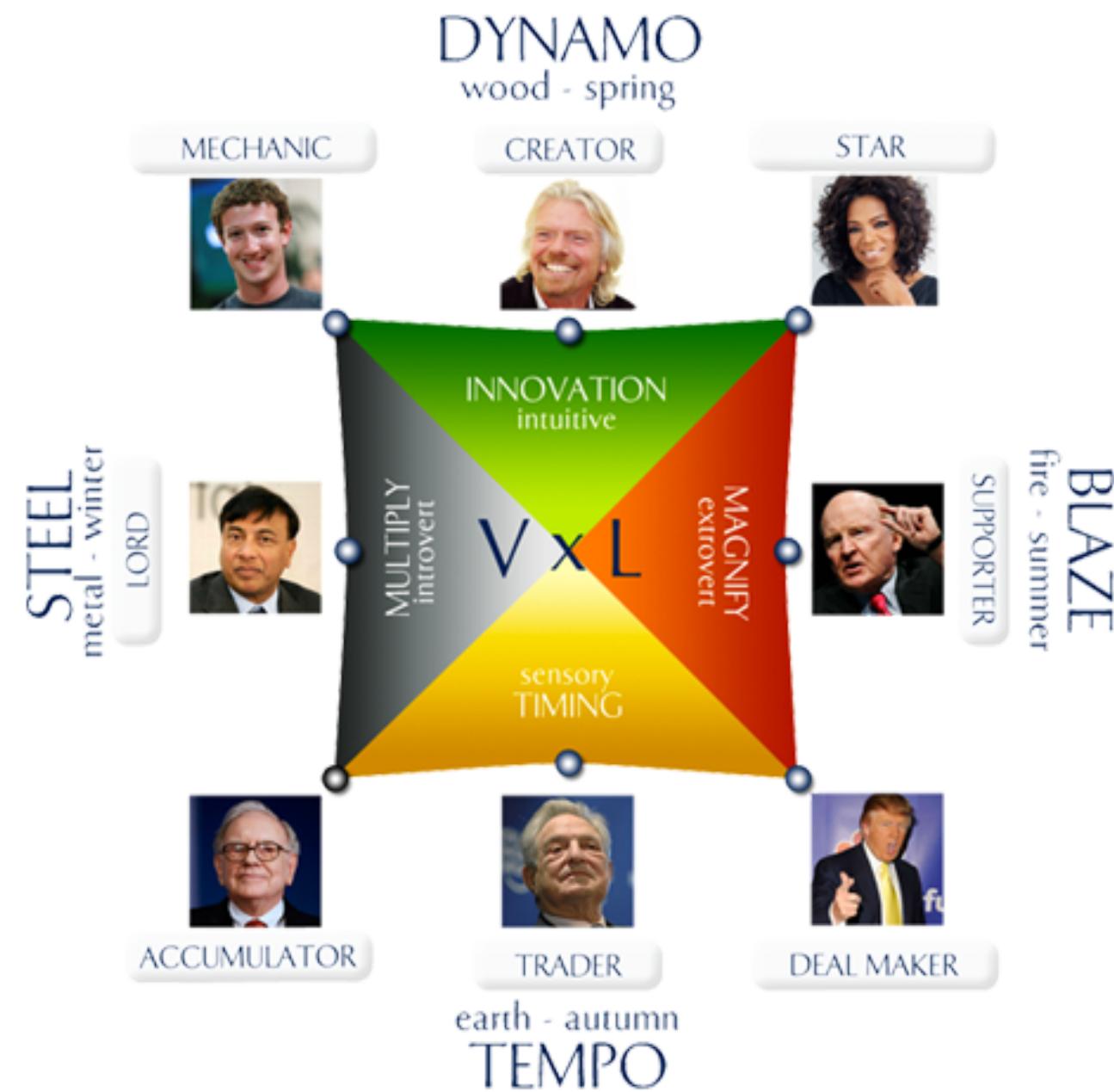


TPX Group is administered from its central offices in Portsmouth and it is intended that this will remain the case until 2024. There is no overriding holding company for the group. Instead it is organised through its connected directors. It is not proposed to alter this structure in the five year period of this plan as each constituent part is free to develop and grow independently.

Currently the CX and Company Secretary are involved in the active running and management of all three practice areas which has an impact on the overall productivity of any one constituent part.

Employment of staff occurs on a 'just in time' basis as business need arises. Whilst this is effective in managing staffing costs it can be disruptive to continuity of service especially when bringing new planners or staff into the practice where a degree of supervision or support is required from more experienced staff.

We all have different strengths and ambitions. We are all at different levels of growth and expertise. In building our team we have used the Wealth Dynamics Psychometric Testing System to understand the strengths and weaknesses within the team. That being said we can do more and there are areas of the team dynamics spectrum which have not been filled.



Our Organisational Chart has two roles within our organisation, it help's to clearly define roles and responsibilities within the group but also where there are efficiencies and potential duplication in work-loading. The point of an organisational chart is to define what we want the business to look like when we are done and it is fully functional.

Chief Executive

Planning

Principal Town Planner

Senior Town Planners

Town Planners

Planning Assistants

Planning Team Clerks

Education

Principal Education Manager

Edu Administrator

Edu Bootcamp Co-Ordinator

Development

Development Projects Manager

Site Find

Development Analyst

R2R Manager

Operations

Office Manager

HR Manager

Accounts and Payroll
assistant

Marketing Assistant

Facilities Assistant

*The roles already filled are in bold and TPX Green.

In 2016 we published our DNA statement on our group website. It stated:

Our DNA defines everything we do as a company, it is our core values, our focus and our sense checking. For us DNA means Drives, Needs and Aspirations.

Our Drives. D

These are the core values that keep us striving for excellence in everything we are doing. They make up who we are as individual town planners and as a company of people working together to deliver developments across the country.

Family: The TPX group is a family of families, each one of us has people we care about that we work hard to provide for. They are the route of who we are and what we do.

Quality: We strive for high quality schemes at whatever level we are working.

Client Relationship: We are driven by to provide a high quality client lead relationship giving the best experience possible to our existing and future clients.

Developments that work: We are not afraid to say no. We want to deliver developments that work now and in the future and work tirelessly to do this.

Our Needs: N

These are what we expect from our clients and the developments we deliver. They make up the basis of our working relationship.

Honesty: We will always be honest with our clients and expect honesty in return. We will be fearless in exercising that honesty whenever we are asked our opinion hope that our clients will respect us for that.

Integrity: We will say no! We believe in supporting our clients in the most effective way and in so doing will always fearlessly express our professional views.

Transparency: We want our clients to know where they stand and what is going on at any time. We agree our fee's up front. We will always tell you where we are and we want you to always be able to ask us what is going on.

Our Aspirations: A

This is where we see our company going. How can it grow and develop as a consultancy and as a group.

We want to be England's go to planning consultancy. We work hard to provide as much advice to as many people as possible through our networking, education and consultancy channels and we will continue those efforts in order to get to this target.

We want to grow into England's go to planning education provider for property investors. Through tie ins with Progressive Property Network, Property Investors Network, Whitebox Property Solutions and our own Property Planning Masterclass and Property Planning Bootcamp (2019) we have already expanded into property education and we will continue to grow this arm of our business.

We want to develop. Through JV partners we are already looking at future developments and we aspire to develop properties within the next 5 years.

Our Vision



Moving into the next 5 year plan our core values and DNA are maintained and reinforced with a more fluid and dynamic approach that is able to respond to change, quickly and proactively.

"I think it is pertinent to say that as our client base grows so do our staffing levels to cope with increased demand. We need to show future growth to maintain the standards we give to our clients."

As that growth propels the individual arms of the business forward the role of the CX will alter from a practitioner/technician to a more traditional Chief Officer taking an overall view of the businesses and the strategic direction of the Group. The overriding vision of the CX being able to dip in and out of each arm of the Group as and when required will be maintained as this is more akin with an overseeing role rather than a practitioner role and allows each arm of the Group to grow organically and at its own rate.

As part of this growth strategy the day to day responsibility of the groups core planning function will fall to Keith Oliver as the groups Principal Town Planner and this will remain the case until the point Keith decides to step down.

The Group will continue to grow organically as per our 2016 DNA statement and we will not force any parts of the business to grow to quickly or beyond our capacity to offer a great value service to our clients.

Social Media has been an excellent platform to propel the Group from its humble beginnings to where it is today. Keeping on top of the Social Media Platforms is a constant occupation and a role in its own right. This part of the Group's marketing strategy needs to be reinforced with a constant focus from all of the planners within the group. It is an important part of the client building relationship that we must maintain.

We need a base! a home so to speak! It is the nucleus of our family! Therefore our home in Portsmouth will remain at the heart of what we do and the base of our head office. Where planners work from home the Group will invest in home office furniture and equipment rather than a separate base of operations. Further in order to support each other and our clients more effectively the Group will have a monthly team meeting so that all our consultants and constituent parts are coming together to share ideas, views, opinions and issues.

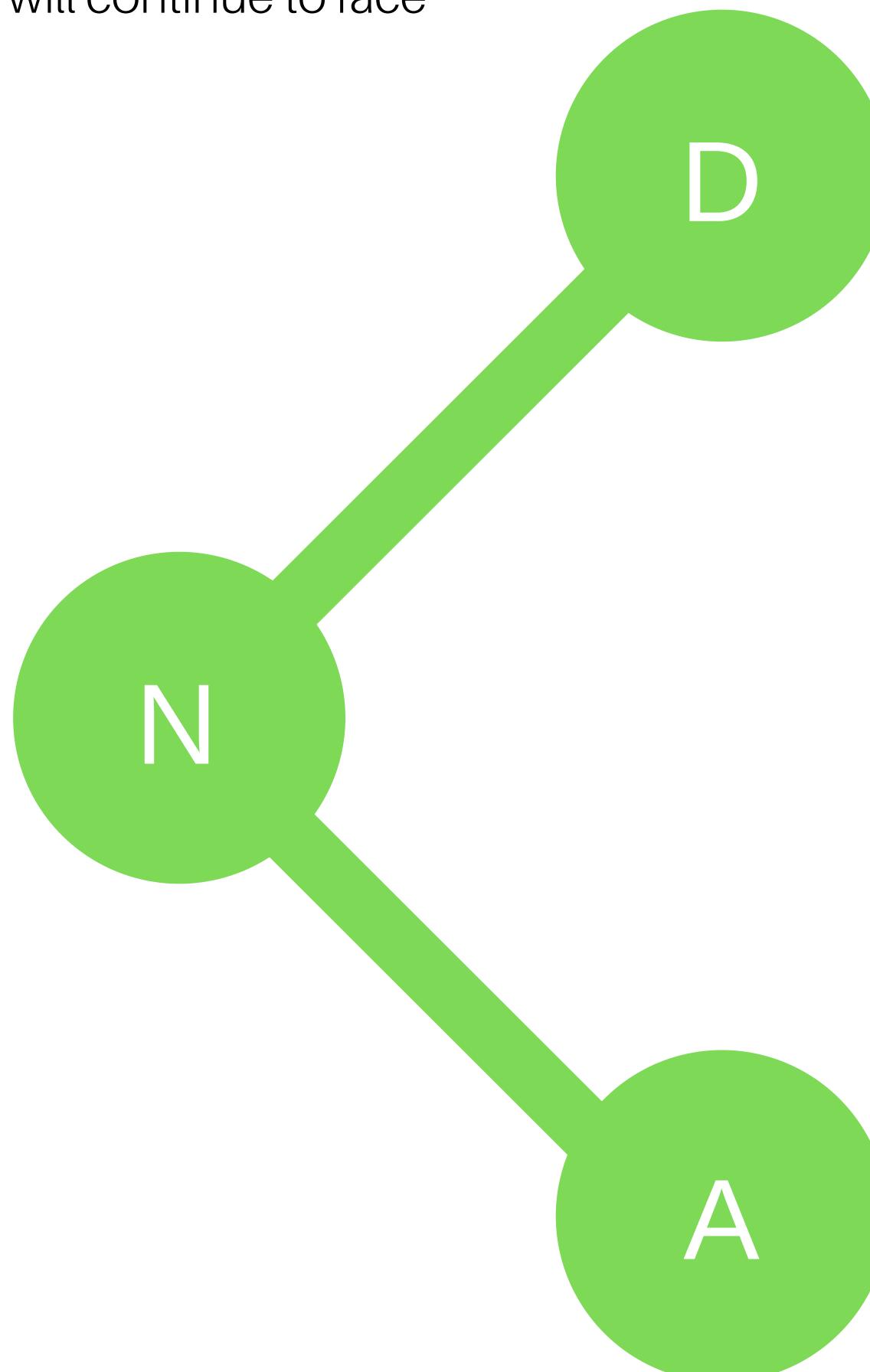
In this 2019-2024 Core Strategy we are able to reaffirm and refocus our DNA statement to meet the challenges we have faced and will continue to face within the next 5 years.

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It is true to say that, at the moment, the 3 arms of the group, our consultancy, education and property are not equal. However it is not as simple as creating parity between the three arms of the company. Therefore each arm should rightly be allowed to grow at its own pace. This will enable a more flexible and dynamic approach to the different work we do.



CS1: By the year 2021 each of the arms of the group will be financially viable in its own right and will have growth forecasted on the previous years organic growth.

CS2: By the year 2021 each of the arms of the group will be headed up by a group lead freeing the CX role for long term planning and to act as the lead for the group as a whole.

The importance of setting clear responsibilities for each of the arms of the group will assist in reducing duplication for all members of the professional team allowing them to deliver the high quality work TPX has become known for.

Multi-Modal Operations

There are, at present, three distinct arms of the business which overlap at times where clients or work crosses from one business to another. They are part of an essential stack of businesses which interact and are interlinked with each other. As the group evolves and as opportunities arise there will be greater scope to add to the services offered by the business and this in turn will reinforce the role of the CX and Management Team of the Group.

It is therefore important that the CX role moves away from being part of the day to day technical team to having a broader focus across the group, dropping into any particular part as otherwise needs attention.

The core focus of the group will always be its planning consultancy work as this is what the group does best always has to be the planning side of things as this is what you do best but the education and developments have huge growth potential.



"The fact there are 3 core businesses to focus on puts the Group in a unique position given how extremely specialised we are and excellent at what you do."

KEITH OLIVER

Principal Town Planner

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Consultancy

TPX first started as a planning consultancy offering planning advice to those who need it. This is the core of our business and the primary day to day work of the group.

"I call it feeding the machine because that is what it is! The planning process is a machine, it chews through sites at a substantial rate of speed and we must treat it as such. We must give it the resources, the raw sites, to generate the development that the country needs to grow and prosper. The skill of the planning consultant is to feed it the best possible raw materials."

Within the five year period Jon McDermott will step back from his role as a Principal Planning Consultant for the Group and focus more of his time on the wider aims of the group as a whole and developing the other arms of the group. Whilst he will continue to deal with some planning work this will be for a controlled list of private clients which will be dealt with more in the Affiliations section

K Oliver

Keith Oliver

Director and Principal Town Planner.

In order to support the growing needs of clients the planning consultancy will continue with its policy of employment on a rate of 1 FTE Planner Per Year. Maximum capacity limits are also to be set in line with policy CS3 that will avoid any one consultant feeling overburdened.



CS3: A hard limit of 30 concurrent cases will apply to all planning consultants within TPX as monitored by the Consultancy Project Management System.

As Keith Oliver nears his chosen point of retirement a new planner will be appointed on a full time basis to take over his role as the Planning Team Lead and to assume his caseload.

CS4: Individual planners within the group will be encouraged to act as subject specialists in a part of planning practice that interests them.

It is important to play to our strengths within the consultancy without stifling our own personal growth. Having a lead consultant on Rural, Town, HMOs etc will give planners within the practice confidence and allow for mutual learning opportunities within the organisation.



Education in Practice

"in my humble opinion the education you are providing has huge growth and there is a very strong demand for it."

The Education arm of the group provides a structured and stable income as well as providing a flow of clients into the consultancy part of the business.

Education maintains an income of its own which is used to the greater benefit of the group and compensates those areas of practice which are not so financially rewarding.

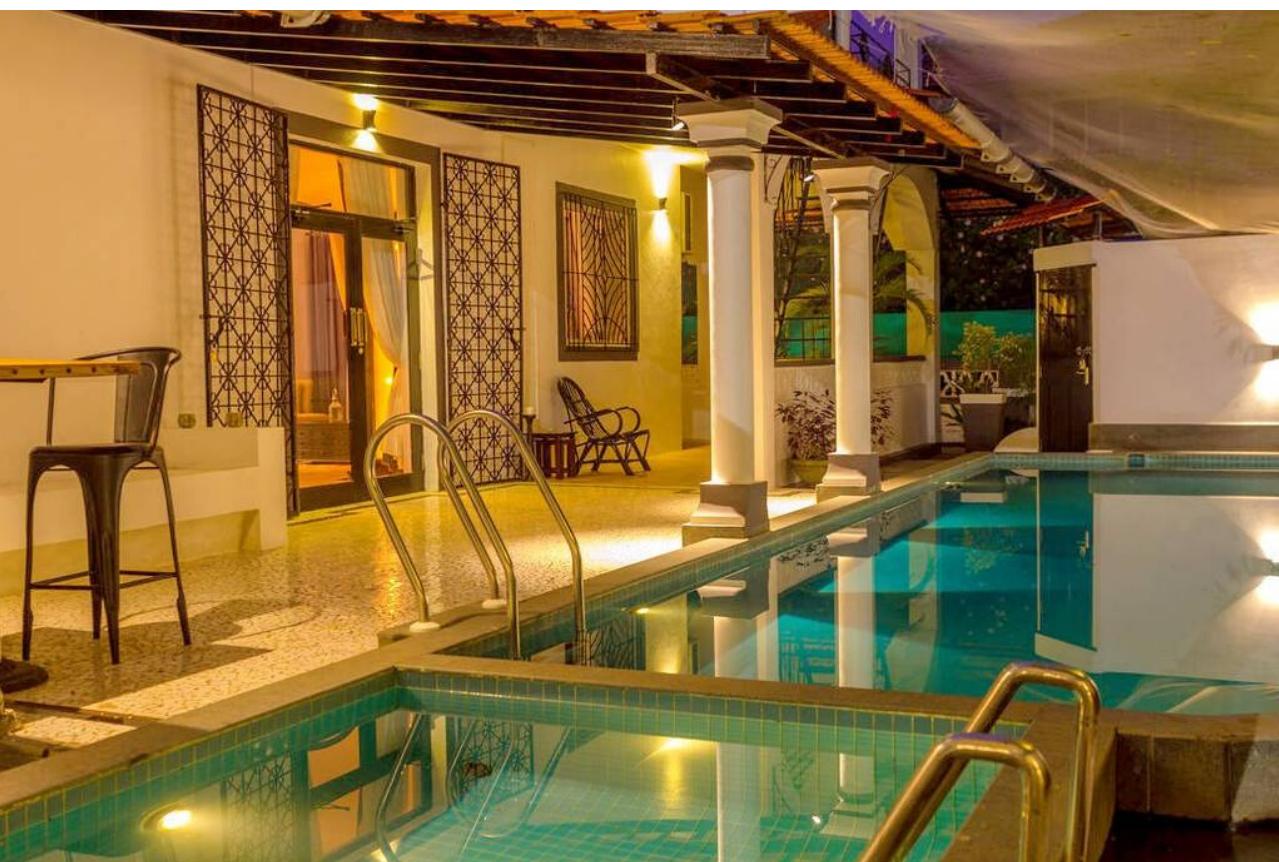
That being said the recent achievements within the Education arm cannot be denied. The Malta bootcamp showed that as a team working towards one goal we are an effective force. Very positive feedback from the Malta Camp should be reflected upon and used as a driver for further improvements to the Camp model..

Bootcamps

CS5: Within the next 5 year period the TPX Bootcamp offer will be enhanced and expanded to 2 camps per year offering a europe and an international camp and building on the strengths of the Malta Camp.

Exposure to the group via its education arm is often the first way that a client will encounter the services offered. Education provides that initial stream and filter of clients who then diverge onto our own workshops, bootcamps and 1-1's and then go onto use us for planning projects. Increasing the number of access points via education into the group is an important growth point for the business as a whole.

Moving the focus of the CX from planning and onto education will allow a greater focus on the client stream and allow a clear 'face of the company' to emerge.



CS6: Within the 5 year period the education offer within the business will be expanded to incorporate 'Mastery Courses' and to enlarge the Planning Workshop offer.

Following on from Malta several of the delegates wanted to know more or to enhance their planning knowledge. As part of CS6 we will seek to expand the planning education offer into a sequence of 'mastery' day courses on the following suggested topics:

How to assess a refusal and turn it into an approval.

The Planning Portal

The consultation process

Community Infrastructure Levy

Permission in Principle

Prior Notifications

Others may be added as and when the need arises.

Bringing in another workshop date would also take advantage of the additional capacity within the education arm as well as meeting the demand experienced by the delegates in Malta and on the workshop waiting list.

Therefore in order to take advantage of this an additional date will be brought in per month by the end of 2019.

Workshops



From feedback at PPN events and on facebook the appetite for people to engage with the wider services of the group is significant. In recent times a hole has appeared within the regional coverage of PPN, PIN and other networks within our home sector. This has not gone unnoticed and there is an appetite for an independent meeting within the Portsmouth Region.

CS7: Between 2019 and 2020 TPX will launch 'The Expert Network' to take advantage of the market deficit in networking meetings within the Portsmouth sub-region and to present its own vision for property networking as a whole.

The Group as a whole see's the power and benefit in launching its own property networking group and will work towards that within the next 12 months. This should be once a month on the 1st Monday of each month and will help spread the wider message of the group and help 'feed the machine'. As an aside it will increase the groups power team and assist with our aspirations to carry out development.

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The aspiration of the group to be involved in and to carry out its own developments is undiminished. Developments provide a long term pipeline of work for the group and a real way for the group to express its vision for development within the UK.

"I think that development area will grow and we need to be prepared for that. This is something very close to my heart and I would hope I get the opportunity to be a protagonist in this arm of the business."

The key feature holding back substantive growth in this area has been capacity to develop the necessary connections and expertise to deliver developments outside of the planning field.

Quality Developments



Quality Developments

At a suitable point within the next 5 years the group will need to engage with a Project Manager as part of its service provision and to ensure delivery of the developments it has committed to.

The other development commitments made by the company as part of its first five year strategy must not suffer as a result and must gain traction between 2019 and 2024.

CS8: TPX Development will be given additional resources between 2019 and 2024 in order to deliver on our existing development commitments and to progress to a minimum of 2 new residential developments per year by 2024.

We have already made connections with Claire Sheehan, Will Doyle and Justin Richards and they are already working with us to support development going forward. A mutual exchange of knowledge and experience will be vital until we get to the point where we are about to finish one development and we are straight onto the next one.

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Senior Town Planner

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Affiliate Programmes

that Work

"The best thing I got from my White Box Developer Secrets weekend was the contacts I made, many of whom I am still in touch with, my experience overall was very positive however the one thing that blew my mind was when Jon spoke on the Saturday, my business partner Andy has also attended the White Box weekend and he said exactly the same, I then sent my builder on the course and he was also of the same opinion. I then encouraged my friend Lewis to enter one of the White Box competitions and Andy & Lloyd gave him a free weekend training course and he was also extremely impressed by Jon".

The Group already has affiliate relationships with Whitebox Property Solutions, Progressive Property Network, Your Property Network Magazine and from March 2019 The HMO Platform. Affiliate programmes have served an important role in creating widespread visibility for the work TPX does as a whole.



Affiliate Programmes that Work

These programmes can however be self limiting. The present affiliation with Progressive Property Network actively discourages our ability to leverage additional gain and being bound by its restrictions is not allowing us to grow.

This five year plan is forward looking and sets policies (CS6 and CS7) where our vision of the world is that we can build more proactively.

That being said the affiliations we have are an important part of the work we do and we should allow these relationships to grow in such a way that they do not act as an artificial brake.

A balanced approach is therefore needed working with our affiliate partners so that both parties benefit from the transaction and are able to grow from it.

CS9: Where appropriate the affiliations part of the group will be spun off by 2024 so as not to artificially restrict the work of the main arms of the business.



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Ensuring Effective Operations

"I guess one of the big things for me is.. naturally in a consultancy everyone has their own case load/roles therefore works independently to an extent. I would really like it for everyone to come together even once a week/month for a zoom call or Skype group where everyone can catch up."

The nature of the group and of the work as it has grown is that we have team members who are remote workers and who feel divorced from the head office by distance or by workload.

Education

Development

Consultancy

Affiliate

Ensuring Effective Operations

Taking the important learnings from other, similar, businesses and in order to foster a greater sense of team unity the following policies will enable greater team communication:

CS10: By the end of 2019 incorporate a monthly zoom/video conferencing call that all can participate in to discuss, amongst other things:

- learnings/issues found with applications/LPA's
- questions or discussions on certain changes or updates of policies etc
- informative updates about workshops and public talks people are attending in the team
- feedback from bootcamps to the rest of the team who didn't attend etc

Because the team is not all in the same office so it makes sense to come together as a team once a month. These sessions can be expanded to include update training as needed on any particular point.

The Group has maintained its traditions to have a summer party and a christmas meal and these are valuable opportunities for team interaction. Using these opportunities of for a 1-2-1 check in with the CX will further support the work of the team as a whole..



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Beyond 2024 - To Infinity and Beyond

The group will seek to build on our strengths but also identify any weaknesses. By looking more deeply at what we do we will seek to improve our wider offer to clients. In addition the group will shout more about our strengths and emphasise our pole position in the consultancy market place. We need to stress our proactiveness in the arena and be 'disruptive' (not aggressive) in our approach to reach new clients.

CS11: In taking a more disruptive approach we will undertake to do the following:

We will set-up and maintain a whatsapp group where the rest of the TPX can share any content they want on social media. This means we can be proactive with our marketing.

Introduce SEO / PPC to get the TPX website higher up the rankings on Google.

Introduce Twitter and Facebook more into the Marketing strategy to cover all social media basis.

Beyond 2024 - To Infinity and Beyond

The group has the potential to be the foremost leading company in England regarding Planning/Development & Education (and is already on its way to that target.) So to be able to advance on that and help it grow more is something that we as a whole are happy to progress.

"Ultimately how I feel is that - I have been part of this company from when it was still Keith and Jon in the Sanderson Centre, I have watched it grow and want to help it to continue to grow and continue to be part of it in any way that is of best use. I would like to work my way through to an Associate level and get to a stage where I will be able to take on more of the Planning side and hopefully a step into the Development side as well as that really excites to me and has been something I would love to be part of too."

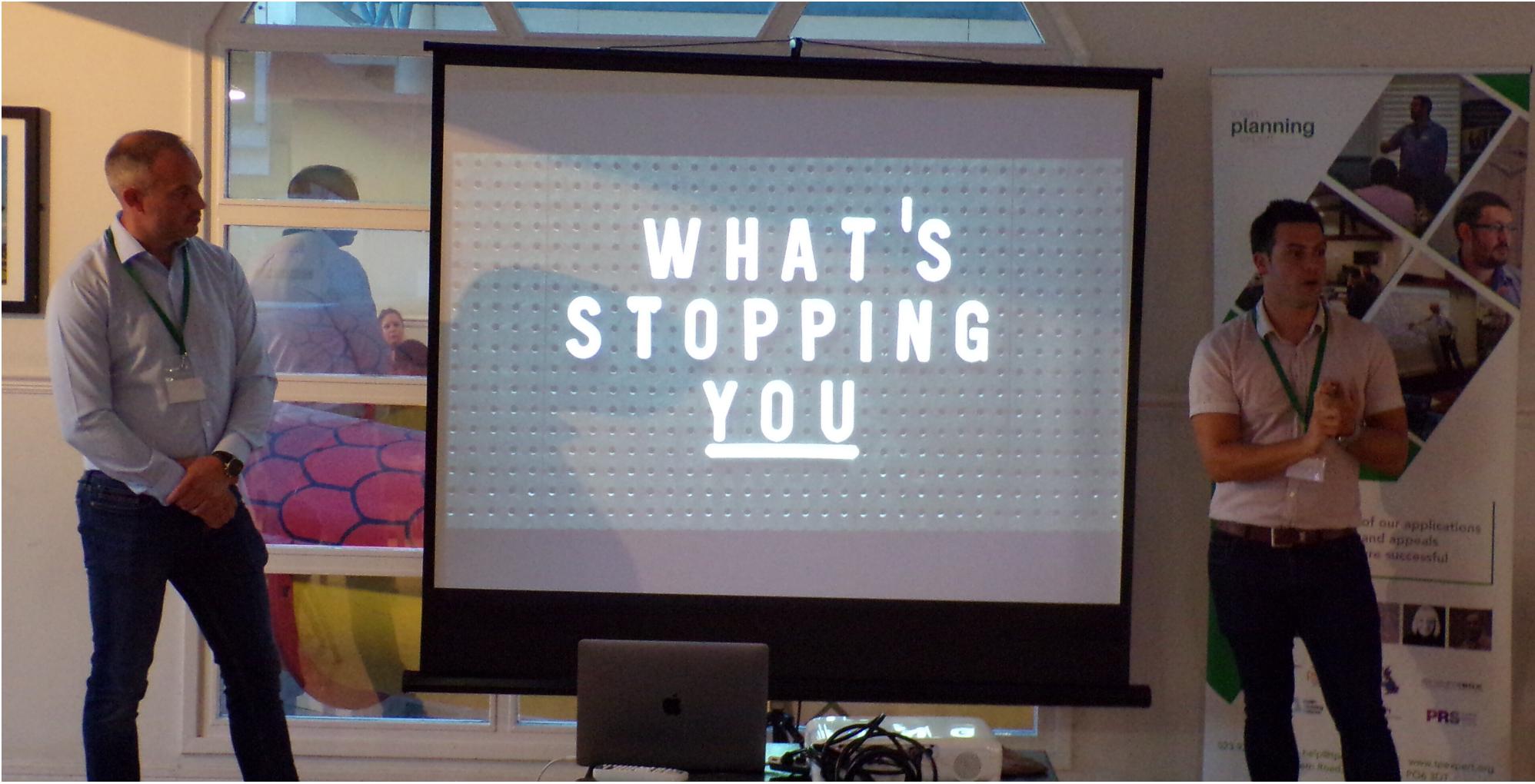
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Organic Growth, Right Place Right Time

"I couldn't find the section on the company's policy on cakes and biscuits though! Is this a whole document still to be written".



To date we have tended to concentrate our workload on small and individual developers/investors. At some time (maybe the following 5 year plan) if we are truly to be a major player we need to be working with the big developers and taking on policy work (Master Planning, Local Plan Inquiries etc).

This will necessitate sourcing the resources to provide such a service. Whether this is by incremental growth, mergers or acquisitions will need to be considered. This may also necessitate reviewing how the Consultancy arm works - possibly with a Minors team - dealing with householder and small developments i.e 1-10 houses, and a Majors team dealing with bigger projects. These would both need to be adequately managed, staffed and resourced (technicians, admin support etc) to reflect their specific roles.

"We may not be ready for this yet, but we may need to be thinking of how we make that leap by the end of this 5 year period as we seek to boldly go where no TPX person has gone before."



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