

## Business Plan Template

This is not the definitive template for producing a business plan, however it contains the types of information that banks and other investors will wish to see. There will certainly be items that are not applicable to your particular business. It may also prompt you to think about certain aspects of your project or business that have been neglected or overlooked. If there are any questions please do not hesitate to contact us using the details shown below.

### 1 Executive Summary

- 📦 Company Profile
- 📦 Company Objectives
- 📦 Product and Service offered
- 📦 Market and Routes to Market
- 📦 Strategic Plan Summary
- 📦 Key performance indicators
- 📦 Management
- 📦 Resource requirements

### 2 Business Model

- 📦 Economic model of inputs and outputs
- 📦 Key inputs and outputs
- 📦 Company Resources
- 📦 Controls and performance measures
- 📦 Summary of assumptions

### 3 Market Analysis

- 📦 Market size and trends
- 📦 Competition
- 📦 Estimated market share and sales
- 📦 On-going market evaluation
- 📦 Customer segmentation
- 📦 Reference to research

### 4 Marketing

- 📦 Marketing Strategy
- 📦 Product/Service Policy
- 📦 Pricing
- 📦 Promotion, marketing and sales tactics
- 📦 Geography, distribution channels
- 📦 People
- 📦 Process

## 5 Operations

- ❖ Existing products/services, uses and applications
- ❖ Development plans
- ❖ Procurement
- ❖ Product improvement and new products
- ❖ Operational Costs
- ❖ Quality objectives
- ❖ Production standards
- ❖ Innovation and technology
- ❖ Current and future technical capabilities
- ❖ Monitoring external technology and process changes
- ❖ Specifications for new systems and buildings
- ❖ Location plans

*commercialising  
your ideas*



## 6 People

- Assessment of the quality of people at all levels
- Projection of skills needed
- Opportunities for development of existing staff
- Recruitment of new employees
- Incentive schemes
- External consultants
- Organisation Chart

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## 7 Financial

- ❖ Forecast Balance Sheets – Summary
- ❖ Forecast Profit and Loss accounts – Summary
- ❖ Forecast Cash Flow – Summary
- ❖ Listing of financial assumptions – Summary
- ❖ Sensitivity of financial results to risks
- ❖ Amount of financing required short-medium-long term
- ❖ Proposed method of financing
- ❖ Proposed cost of financing
- ❖ Proposed use of funds
- ❖ Company Structure
- ❖ Information and accounting systems
- ❖ Security procedures
- ❖ Information for management
- ❖ Controlling liquidity
- ❖ Controlling profitability

## 8 Risk Analysis

- 📦 Market Risk
- 📦 Country Risks
- 📦 Industry Risk
- 📦 Uncertainties
- 📦 Mitigation of risks and uncertainties
- 📦 Outline of contingency plans, decision points

## 9 Appendices

- 📦 Curriculum Vitae of directors and key managers
- 📦 Portfolio of project work, products and services
- 📦 Brochure/Portfolio
- 📦 Financials
- 📦 Current year monthly balance sheet, 3 year quarterly summary
- 📦 Current year monthly profit and loss, 3 year quarterly summary
- 📦 current year monthly cash flow, 3 year quarterly summary
- 📦 Detailed financial assumptions
- 📦 Summary of financials for contingency plans