

Business plan template

This simple business plan template provides an outline of what to include in your own plan, and provides room for you to input your own answers.



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Section 1 - Executive summary

Mission statement

A few sentences that truly sum up what the business does for its clients, your aims for the company and what makes you stand out amongst your competitors.

Products and services

List your products and services, clarifying exactly what your business offers.

Credentials and accolades

Make mention of any companies you've worked with or other investors who are already on board. This is also an opportunity to list any accolades, awards and wins that are relevant.

Section 2 - Management and personnel

Company background and existing commercial experience

This section should make note of the background and experience of all the key members of the management team.

Operational summary

This is an opportunity to summarise how the business will operate from a hierarchical perspective, how many personnel you'll need in the long-term and other details about how the business will work day-to-day.

Advisors and partners

List the key details of your trusted advisors and partners who have helped get your business to this point. Investors will be keen to get to grips with who you have worked and collaborated with previously.

Section 3 - Marketing and analysis

Target market

Summarise your target market, supporting your claims with quantifiable data to demonstrate to investors that demand for your product or service exists.

Competitor analysis

Note your key competitors, focusing on what they're doing and how your offering differs.

Market position

Be realistic about your market position and where you see your business sitting in the current landscape. Include SWOT analysis data to quantify your claims.

Risk analysis

List the risk factors your company may face in the short- and long-term, and your plans to mitigate.

Section 4 - Finance

Revenue generation

Begin this section by focusing on the positives, like how much revenue you expect to earn in the first 12 months of trading, and how much you've made so far.

Cashflow forecasts

Listed by quarters, for a minimum of three years.

Loan applications

List details of any loan applications and information about other acquired assets.

Equipment and supply

Make a list of necessary overheads relating to equipment and stock your business will require day-to-day.

Section 5 - Next steps

Now you have your business plan in place, there are a few directions you can take to help progress your business:

- Distribute the business plan to all stakeholders and key members of staff
- Set relevant KPIs to ensure your business plan stays on track
- Schedule a monthly review to measure your performance
- Build a reporting dashboard to record your progress
- Connect with a dedicated consultant to help with any uncertainties you may have