

# Business



# Plan

# Template

Your Fill-In-  
The-Blanks  
Guide to  
Business  
Success



**BusinessBlueprint**  
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## BUSINESS PLAN

Prepared by:	<div>[Name/s]</div> <div>[Title]</div> <div>[Business Name]</div> <div>[Main Business Address]</div> <div>ABN: [ABN]</div> <div>ACN: [ACN]</div>
Date:	<div>[Date Prepared]</div>

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## ABC COMPANY AT A GLANCE

### BUSINESS PLAN PURPOSE

*Briefly explain your purpose for this plan, who it is aimed at and the benefit you expect to get from it.*

[Click here and type]

### BUSINESS STRUCTURE

*Describe the business structure (e.g. company, partnership, sole trader, etc). Include ownership of the business.*

[Click here and type]

### BUSINESS PURPOSE

*Outline what the business does. Is it a niche or broadly focused business? What is the USP (Unique Selling Proposition – what differentiates you from your competition)?*

[Click here and type]

### PRODUCTS AND SERVICES

*List the products and/or services you offer. Provide a brief description if your product and/or service is not immediately obvious.*

[Click here and type]

### WHAT DIFFERENTIATES [COMPANY NAME] FROM ITS COMPETITORS

*Describe what sets you over or above your competitors.*

[Click here and type]

### MARKET OVERVIEW

*Outline the industry sector you operate in and your target market/customers.*

[Click here and type]

### BUSINESS GOALS

*List your top three goals for the period covered by this plan.*

[Click here and type]

## BACKGROUND

*Set out below relevant information covering the start-up of the business (when and why), the business opportunity that will underpin its success. The current developmental stage of the business (start up, growth, consolidation, mature, preparing to exit). After this, you may wish to include: Have there been any significant changes in the focus, direction, products/services or your customers? Have there been any changes in ownership? What milestones have been achieved? Is there a core philosophy, culture or set of values that defines or guides your business? Use headings if this will make it easier to follow.*

[Click here and type]

## ORGANISATIONAL STRUCTURE

*Draw an organisational chart to show the structure of your business and clarify the roles played by your team. If multiple people occupy a single role, consider showing the number of people in the role rather than individual names. Indicate if any positions are planned rather than actual.*

[Click here and Paste your Organisation Chart]

[Click here and type]

*If your business is related to another business or entity, consider including a diagram to illustrate how these businesses relate to each other.*

[Click here and type]

## KEY PEOPLE

*List the people who you consider of key importance to the ongoing operation or success of your business, together with the role they fill. If required, include particular skills, qualifications, knowledge and experience that they bring to the business.*

[Click here and type]

## KEY ADVISERS OR ACCOUNTABILITY PARTNERS

*List all the people who are not actually part of your business but on whom your business relies for its ongoing success. Include those who fill important roles that complement what you have internally. If any of these roles have been formalised (e.g. as an Advisory Board), indicate this.*

[Click here and type]

## BUSINESS ENVIRONMENT

*Describe broadly the market you operate in the present time. What factors are influencing this market? Consider prevailing sentiment/the economy, seasonal movements, regulatory environment, innovations in technology or practice.*

[Click here and type]

## SWOT ANALYSIS

*Analyse your business in the current environment in terms of strengths & weaknesses (internal) and opportunities & threats (external).*

[Click here and type]

*Review your SWOT analysis and comment on the following: how will your strengths help you to maximise opportunities and minimise the threats; how would your weaknesses hinder your efforts to achieve the opportunities; and how might your weaknesses leave you open to the threats?*

[Click here and type]

*What strategies do you have in place or plan to implement in order to overcome or manage the issues you have listed above?*

[Click here and type]



## MARKETING PLAN

*The Business Blueprint® Business Plan template (this document) includes a high-level marketing plan, which may be suitable for your needs. Alternatively, you can use the separate Business Blueprint® Marketing Plan template, which allows you to go into more detail to plan your marketing activities. If you decide to create a separate Business Blueprint® Marketing Plan, you can delete this section (that is, from the 'Marketing Plan' heading down to 'Operating Plan'.)*

### TARGET MARKET

*Define your target market (where appropriate, select from: gender, age group, income, marital status, family size, where they live, occupation, spare time interests, values, needs, etc). If you have defined your 'avatar', define him/her. If your target market is changing or does not represent the majority of your customers, explain why.*

[Click here and type]

### CUSTOMER NEEDS

*Describe why your customers need or want your products and/or services. This could include: speed, quality, reliability, comfort, location, price, value, customer service, convenience, ease of use, etc).*

[Click here and type]

### COMPETITORS

*Identify your key competitors either through web search or from customer comments. Compare the relative strengths of your competitors against your business in terms of: (select from) products/services offered, price, market share, time in business, size, target market, position in the market, strengths, weaknesses. Pay particular attention to those competitors who closely match your business.*

[Click here and type]

## MARKETING ACTIVITIES

### PAST ACTIVITIES

*Describe what you do to promote your business in your target market. What do you do that makes your customers want to buy from you? What message or image do you present? List the marketing activities you have engaged in recently, being sure to include those that were unsuccessful or revenue neutral as well as those which were successful. Assess the effectiveness of these activities in terms of: timing, media used, target audience, campaign objective, internally/externally managed, cost, ROI, etc. Identify which were your most effective marketing activities and which were your least effective.*

[Click here and type]

### FUTURE ACTIVITIES

*Outline the marketing activities you plan to implement in the future. If you have included any activities which in the past have been either revenue neutral or did not give the expected return, make clear what you will be doing differently this time. Consider the full range of sales and distribution channels. Optionally, list the products/services relevant to each channel.*

[Click here and type]

## CUSTOMER STRATEGY

*Perhaps using the headings Acquisition, Retention, Separation and Expulsion, describe their strategies you will implement to acquire new customers (how many, staged over what period), what you do to retain existing customers (real, focused activities only), how you respond to customers who stop purchasing from you, and how you divest your business of customers you would prefer not to sell to.*

[Click here and type]

## CUSTOMER VALUE

*Define the value proposition for your customers. If this has changed, what influenced this change? Is this perceived value consistent with the customer strategies you have described above?*

[Click here and type]

## OPERATING PLAN

### PRODUCTS AND SERVICES

*List the products and services offered, categorising them and summarising where necessary.*

[Click here and type]

### PRICING

*Define how you price your products (market value, margin, markup, other). Describe any variations (bulk discounts, packages, bundles, bonuses, online purchase, etc). Are your prices dependent on supplier pricing or other external influences (e.g. foreign exchange rates)?*

[Click here and type]

### PAYMENT

*What are your standard payment terms? Do you modify payment terms in response to customer payment history? What payment methods do you offer and which of these are most popular with your customers? Do you have systems in place to manage payments (particularly late payments)? Do you have subscription or membership plans with recurring payments? Do you accept online payments?*

### ORDER FULFILMENT

*Describe how your products or services are sold – wholesale/retail, phone, website, mail order. Who is involved in the sale and distribution of your products?*

[Click here and type]

*For services, describe how they are delivered – directly by your team or contractors, by others. Consider what happens pre-/post-delivery.*

[Click here and type]

### GROWTH

*Describe how you expect your products or services to evolve or change over the period of this plan. What are the drivers for these changes? What are the key business milestones that you expect to achieve?*

[Click here and type]

### SEASONALITY

*To what extent is your business affected by seasonal fluctuations? How do you manage these fluctuations? Do you offer alternative products/services to offset the impact of seasonality? Is there any impact on your staffing? Do you have a 'close-down' period? Does your response to seasonal fluctuations vary from that of your competitors?*

[Click here and type]

## REGULATION/LEGISLATION

*What regulations or legislation govern the activities of your business? Are your activities/products/services monitored by an external body? Are you required to report externally? What licences or accreditations are required and what is required of your business to maintain them?*

[Click here and type]

## KEY SUPPLIERS

*Which suppliers are critical to your business success? Do you have service agreements in place with them? Do you have backup suppliers who could cover a supply interruption?*

[Click here and type]

## KEY CUSTOMERS

*List those customers who stand out from the others in terms of sales volume for income earned. Describe the steps you have taken or planned to take to ensure that these customers stay loyal to your business.*

[Click here and type]

## FACILITIES

### PREMISES

*Describe your current business premises, whether leased, owned or shared. Do you expect to continue using these premises for the period of this plan? If not, what are your future requirements and what steps have you taken to meet them?*

[Click here and type]

### ASSETS, PLANT AND EQUIPMENT

*List significant assets, plant and equipment used by your business. Indicate those items which are owned or leased. Consider attaching a copy of your assets register if this will be useful to the reader. Do you have maintenance agreements in place for your plant and equipment?*

[Click here and type]

### STOCK AND INVENTORY

*What stock levels do you typically carry? Are stock items rotated? Do your suppliers accept returns? How well do you manage stock lead times? Do you manage your inventory using a software application? How closely does your ordering match your stock turnover, in terms of time and order quantities?*

[Click here and type]

### SERVICE DELIVERY

*If customers come to your premises to use your services, how closely do your premises fit your needs? Do you expect this to change during the period of this plan? Do you use external premises for service delivery? Do you have agreements in place to protect your use of these premises?*

[Click here and type]

## **INTELLECTUAL PROPERTY**

*What protection do you have in place to protect the intellectual property of your business? Do you have confidentiality agreements in place with your team and advisors? Do you hold any trademarks, design rights or patents? Do you have copyright notices on all original, printed or online material?*

[Click here and type]

## **RESOURCES**

### **PEOPLE**

*Do you have the right mix of skills and experience in your current team? What do you have in place to ensure that your team is properly trained and incentivised? Career plans? Supportive culture?*

[Click here and type]

### **FINANCIAL**

*Are your financial resources resilient enough to meet your current and future needs? Do you have facilities in place to manage any seasonal fluctuations, if applicable? Are your finances matched to your cash flow demands?*

[Click here and type]

### **BUSINESS DATA**

*Describe how you collect, store and use customer information. How secure is this information? Does your storage and use of this information meet the requirements of privacy legislation? Do you have a backup regime in place to protect your data - onsite/online/offsite? Do you periodically conduct a test restore of your data to ensure that the backup regime works?*

[Click here and type]

## RISK MANAGEMENT

### RISK ASSESSMENT

*What significant risks does your business face? List the key risks identified and assess them in terms of probability and impact on the business. Lastly, summarise the steps you have taken to manage this risk.*

[Click here and type]

### BUSINESS CONTINUITY

*Looking at the risks you have listed, identify those with the highest potential to damage your business. For each risk listed, describe concisely how you would manage the business if that risk were to be realised. How would you process sales? What about order fulfilment? Stock management? Do you have backup copies of team contacts, customer lists, supplier contacts?*

[Click here and type]

### SUCCESSION PLANNING

*If your business is at the stage where you are trying to step back or perhaps sell it, what is in place to let this happen without impacting negatively on the business (and the team)? Have you trained/groomed your successor? Think similarly about each of your key people. What is in place to protect the business should they decide to leave?*

[Click here and type]

### INSURANCES

*In addition to the insurances that you are obliged by law to take out, what other insurance policies do you hold to cover the risks you have identified? How recently was the adequacy of your insurances assessed?*

[Click here and type]

## FINANCIAL ANALYSIS

### CURRENT PERFORMANCE

*How is your business tracking in terms of sales, revenue, profit? Include other data to illustrate business performance, such as debtor days and sales/revenue per team member. Speak to your accountant and decide if you should include other performance data such as return on equity, cash flow to debt ratio, quick ratio, etc.*

[Click here and type]

### FINANCIAL FORECASTS

*Complete the following worksheets to show your forecast financial performance for the period of this plan. Include a summary of any assumptions you have made in support of your forecasts.*

- [Optional] Start-up expense analysis
- [Optional] Breakeven analysis
- Profit and loss forecast
- Balance sheet forecast
- Cash flow forecast

[Click here and type]

## BUSINESS GOALS

### LONG TERM

*Define each business goal and indicate the date for completion and person responsible. Make sure that each goal passes the reasonableness test and is SMART (that is: this Specific, Measurable, Achievable, Realistic, Time-related). Optionally, you could include a list of your personal goals these are relevant to this plan.*

[Click here and type]

### MEDIUM TERM

*If relevant, list your top three goals for the next 6 or 12 months in the same way as you did in the previous section.*

[Click here and type]

### 90 DAY PLANS

*Consider listing the goals from each 90 Day Plan that is completed during the period of this plan. They should be consistent with your long and medium term goals.*

[Click here and type]



## BUSINESS PLAN REVIEW

*Identify when it would be appropriate to review the progress you are making towards achieving your goals for this period. This review should cover the financials, Operating Plan and Marketing Plan as well as your achievement against your 90 day plans.*

[Click here and type]

