



Business Planning Template

THE BIG PICTURE - VISION

- **How do you see your business in 5 or 10 years time?**
 - *Market leader, responsive, expansion*
- **What kind of business do you want?**
 - *National, successful, profitable*
- **How big do see the business getting, in terms of revenue or number of employees?**
 - *\$50m revenue*
 - *50,000 customers*
 - *400 employees*
- **What kind of products and services do you see the business providing?**
- **What markets will you service?**
 - *Small, medium, large, industry verticals*

MISSION

A mission helps to crystallise your vision into action oriented strategies. *How do you want your business to operate in the near future, what products do you want to provide to which market, what drives your business.*

Below are some thought starters to help you define your mission statement:

1. Customer Focus: *How do you want to achieve customer focus, what processes do you want to follow, what satisfaction rating do you want to achieve.*
2. Leadership: *What type of leadership do you wish your business to achieve, by product type, industry vertical, service delivery, people management.*
3. Effective Resource Management: *What type of workforce do you wish to grow or sustain, life balance, industry experts, leaders in the specialty*
4. Branding: *How do you wish to leverage your company brand, are you satisfied that you have maximised your company brand to bring in ongoing revenue*
5. Commercial Discipline: *Do you follow processes and procedures that lead your industry, are your internal systems up to speed.*

THE SALES PLAN

The Sales Plan is the performance yardstick of the business plan. It tells us: -

- Your Vision and Mission will give you a clear direction about how you want the business grow, what markets you want to be in, how big you want to grow and how much time, money and effort you are prepared to give to achieve your vision.
- The Sales Plan will tell you what the first step is in achieving your personal and business objectives.
- How much revenue do you need in the next twelve months?
- How much of that will come from your clients existing business?
- How much will come from new business generated from your existing client base?
- How much income will you need from new clients?
- Where will that business come from?
- What sort of clients are looking to attract? (e.g. – Potential Exporters, Corporates)

- What market are they in? (e.g. – Manufacturing, Health)
- What products and services do you need to offer to attract them?
- How many of these clients will you need to attain?
- How many do you need to contact to reach your target sales?
- Do you need to do any other advertising?
- How will you judge what strategies are worthwhile?

THE SALES PLAN

| | Number of Clients | Core Revenue | Other Revenue | Total Income |
|--------------------------------------|-------------------|--------------|---------------|--------------|
| EXISTING CLIENTS | | | | |
| A | | | | |
| B | | | | |
| C | | | | |
| D | | | | |
| E | | | | |
| TOTAL INCOME | | | | |
| EXISTING CLIENTS | | | | \$ |
| | | | | |
| NEW BUSINESS | | | | |
| Existing Clients | | | | |
| A | | | | |
| B | | | | |
| C | | | | |
| D | | | | |
| E | | | | |
| | | | | |
| NEW CLIENTS (SOURCES) | | | | |
| | | | | |
| Referrals | | | | |
| Third Party relationships | | | | |
| Channels | | | | |
| Distributors | | | | |
| Other: Seminars, advertising, online | | | | |
| | | | | |
| | | | | |
| | | | | |
| NEW BUSINESS INCOME | | | | |
| | | | | |
| | | | | |
| | | | | \$ |
| TOTAL INCOME | | | | \$ |

THE MARKETING PLAN

What strategies do you need to undertake to achieve your Sales Plan? *A marketing plan helps you define support mechanisms that may be required to achieve your sales objectives and also identifies how you wish to manage your company branding and positioning.*

Products & Services: *List your products and services below by groupings. Groupings might be by product, industry or customer type.*

Group A

-
-
-
-

Group B

-
-
-
-

Group C

-
-
-
-

Pricing Strategies for each group

-
-
-
-

THE MARKETING PLAN

What strategies do you need to undertake to achieve your Sales Plan?

Products and Services: *Incorporate any changes that need to be considered when marketing your products and services, are there things working well for one product that can be transferred to another product?*

Pricing Strategies: *Are your pricing strategies consistent, do you address discounts and volume sales profitably, are you market competitive.*

THE MARKETING PLAN

Where will the business come from? *List all your revenue channels below.*

Distribution Channels

- Existing Clients
- Referrals from existing clients
- Channels
- Distributors
- Associations
- Strategic Alliances

Promotion

- Advertising
 - Newspapers
 - Television
 - Radio
 - Outdoor
 - Signage
 - Local Clubs
- Seminars
 - "A" class clients
 - Accountants clients
 - Other Centres of influence
 - Strategic Alliances
- Direct Mail
- E-Marketing
- Web-Site

THE MARKETING PLAN

Distribution Channels – where will the business come from? *(also refer to Sales Plan)*

Promotion

THE OPERATIONAL PLAN

For most businesses, their success is dependent on their people – having the right resources in the right jobs. List all your personnel below, highlighting any potential risks, gaps or areas for improvement.

| Area of personnel | Number | Location | Strategies | Timeline | Accountability |
|-------------------|--------|----------|------------|----------|----------------|
| Sales | | | | | |
| Marketing | | | | | |
| HR | | | | | |
| IT | | | | | |
| Administration | | | | | |
| Production | | | | | |
| Apprentices | | | | | |
| Other | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

THE OPERATIONAL PLAN

New Ideas and Initiatives: List any new ideas, products, initiatives or campaigns you would like to achieve in the next 12 months.

| Area | Description | Actions |
|----------------------------|-------------|---------|
| <i>Product Development</i> | | |
| | | |
| <i>Marketing Campaign</i> | | |
| | | |
| <i>Sales Channels</i> | | |
| | | |

THE OPERATIONAL PLAN

Location (Geography): *Explore any geographical moves, expansion or economies of scale.*

THE OPERATIONAL PLAN

Summarise your major operational initiatives below:

Action Plans

Timelines & Milestones

Accountability

Integrated Sales & Marketing Calendar

| | Activities/Time/Date | Objectives | Outcomes |
|-----------------------|----------------------|------------|----------|
| Sales Initiatives | | | |
| Marketing Initiatives | | | |
| Product Development | | | |
| Channels | | | |
| Other | | | |