

# Business Plan Template Example

A Business Plan is a formal written document that you can use to identify the purpose of your company, make important decisions about your future and secure finance.

The following basic business plan template has been created to provide guidance on what to include in your business plan.

Please note that the names in this business plan are for example purposes only and should be replaced with your own information when creating your business plan.

# Business Plan

Company Name

LOGO  
(if you have one)

Prepared by: -

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## 1. BUSINESS INFORMATION

This should include all relevant associated organisations or group companies with common beneficial owners that are key to your business. It should also include a description and commentary of what activities all associated companies carry out and their relationship to the applicant company. It should also go on to explain why this particular legal structure or group structure of companies has been set up in this way and detail the advice given.

### 1.1 Business/Company Name(s)

Address  
Phone numbers  
Co. Reg. Number & date of incorporation (if applicable)

### 1.2 Directors/Partners/Proprietor

Name/Address  
Phone/E-mail Address  
Office Held  
Name/Address  
Phone/E-mail Address  
Office Held  
Name/Address  
Phone/E-mail Address  
Office Held

### 1.2b Key Personnel

Name/Address  
Office Held

### 1.2b Shareholders

Name/Address  
Shareholding Percentage

### 1.3 Bankers

Name  
Branch address  
Contact Name (if appropriate)  
Phone No.

### 1.4 Accountants

Name/Address  
Phone/E-mail Address  
Office Held

### 1.5 Legal Advisors

Name/Address  
Phone/E-mail Address  
Office Held

### 1.6 Finance Consultants

Name/Address  
Phone/E-mail Address  
Office Held

## 2. EXECUTIVE SUMMARY

(it is easier to complete this section after the full business plan has been completed)

### 2.1 The Business

Newco was formed in ..... and is involved in .....(the manufacturing and sales of ...../ provision of consultancy services in .....etc)

### 2.2 The Objectives

The objective of this business plan is ..... (to raise sufficient capital to fund the future development plans ..... / to provide the Management Team with a clear focus on the development plans of ..etc).

### 2.3 The Personnel

The key personnel of the company are ..... (David Smith Managing Director, Robin Brown Financial Director and Clive Simmons Sales and Marketing Director ..)

### 2.4 The Market

Our target market is ..... (the financial services sector / domestic end users of cleaning services ....etc)

This market sector is ..... (currently worth £ million and predicted to grow at / 2 million household within a 10 mile radius of Liverpool city centre ....etc).

### 2.5 Financial

Summary financial projections show:

	Forecast 1	Forecast 2	Forecast 3	Forecast 4	Forecast 5
Turnover					
Gross Profit					
Net Profit					
Net Tangible Assets					

The total Funding requirement is £XX,000, comprising:-  
(List all uses of funding in reasonable detail.  
For example- see below)

Capital equipment	£	X,000
Start-up costs		X,000
Vehicles		XX,000
Working capital		XX,000
		XX,000

It is proposed that this will be funded by:-

Directors' capital	£	XX,000
Loan Funding		X,000
Equity Capital		XX,000
		X,000
		XX,000

Delete one of the undermentioned as appropriate.

### 3. BUSINESS DESCRIPTION

This section is a narrative of your business and sets you in the market context by covering some or all of the following issues)

#### 3.1 Business Background

Status (sole/partnership/company)

Size (sales/turnover)

Employee numbers

Where you propose trading and why

Any key assets (e.g. property)

#### 3.2 Product & Services

Products /services

#### 3.3 Management Of The Business

This section deals with how you, the management, go about controlling the business.

What is the management structure?

Brief profiles of the directors/owners highlighting relevant skills & experience (formal CVs of the principals should be included as Appendices).

Who does what i.e.- responsibilities?

#### 3.4 Business Objectives

(This section should detail the key issues that will in a fundamental way effect the success of your venture)



## 4. MARKETING PLAN

Your narrative will no doubt require a detailed assessment to enable you and any reader of your business plan to identify if a market exists to support your aspirations and how you propose to access your customers.

Parts of this plan should be historical to support any decisions for development and part should be judgement of the future based upon as much research as you can reasonably carry out on the market and your potential customers.

### 4.1 General

Where do you operate?

What do you make/provide?

Unique selling proposition/competitive advantage?

Who are your customers?

Any key customers?

Who are your competitors?

are any posing a threat?

any role models?

what makes you different?

what are their products?

### 4.2 Market Trends

Size of market

Growth and total market

Specific market trends

What share are you aiming for?

### 4.3 Sales & Marketing Strategy

How will you market your product/service

Analysis of what it will cost

Advertising/value for money

Customer care

Targets for customer growth

## 5. CASH FLOW CYCLE

A clear explanation of how your cash flow cycle operates or will operate should be provided.

Stock purchases may see you granted credit terms by your suppliers. These should be stated.

If you purchase for cash, but this is through an overdraft facility please mention.

You may sell on credit to businesses and for cash direct to the general public, this should be fully explained

If you sell in a variety of ways then detail each individually. The description given should make it understandable as to how your cash flow cycle works.

A live example can be used if this makes the description easier.

## 6. BUSINESS ANALYSIS (S.W.O.T)

Your business should be analysed in terms of strengths, weakness, opportunities, and threats. You should describe how the weaknesses will be controlled and the threats countered)

### Strengths

Unique product protected by Patent

Vastly experienced management team

### Weaknesses

Lack of market recognition

Working capital restrictions

### Opportunities

Growing market for widgets

Ability to respond quickly to customers'/market needs

### Threats

Changes in legislation may effect product design

Aggressive competition

## 7. OPERATIONS

This section should explain, in easily understood terms, the way your business operates from a practical point of view. It serves to underline the control of day to day issues to ensure the business remains profitable.

### 7.1 Business Premises or Site

- Access
- Traffic control
- Maintenance issues
- Any special features
- Any environmental issues.

### 7.2 Plant, Equipment and Tools

- What is used and how
- Condition and replacement policy
- Manning and maintenance
- Process involved

### 7.3 Quality issues

- Are you intending to be ISO9000 accredited?
- Customer complaints
- Quality improvements
- Product guarantee insurance

### 7.4 Business Systems

- Use of Information Technology
- Accounting Systems and Financial Controls

### 7.5 Health and Safety issues

- Safety policy
- Cossh assessments
- Liaison with H&S executive

## 7.6 Human Resource issues

- Recruitment
- Special training requirements
- Compliance with HR legislation

## 7.7 Environmental Considerations

You should highlight any risks or any environmental regulations applicable to your business and deal with how you propose to manage any risks to minimise the environmental impact of your business.

## 8. FINANCIAL ANALYSIS

Comments upon:-

Sales forecasts & assumptions

Cost of sales & stock levels

Gross profit margins

Overhead items

Net profit

Capital expenditure planned

eg Property

Plant and equipment

Vehicles

Sensitivities

This must deal with the possible negative factors which may face the business should things not go to plan.

What if sales forecasts are not met?

What if interest rates increase substantially?

Are labour rates/material costs in danger of rising?

Etc?

## APPENDICES

This section must include any documents referred to in the narrative together with any which you believe will enable the reader to better understand your business and list of all other documents submitted.