

Business Plan in an Hour



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A person wearing a light blue button-down shirt is shown from the chest down, sitting at a desk. They are holding a black and silver pen in their right hand and writing on a white document. Their left hand is resting on the document. The background is blurred, showing what appears to be a meeting or office setting. The text 'Section 1' is overlaid in large white font across the center of the image.

Section 1

Strategic Planning Template

Pre-Planning Questions to Consider

Who is this plan for?

What roles and responsibilities should be defined prior to the planning session?

Who will facilitate the Strategic Planning Process?

How much time should be allowed for the completion of this plan?

What resources should be available to support the planning process?

Where will the session be taking place?

Who will be responsible for being the scribe, crafting the content, and populating the template?

Who should review the draft, and draft revision?

How often will the progress be reviewed?

Who is responsible for measuring the progress?

Strategic Planning Questions to Discuss

Step 1: Values

1. Why are you in business?
2. What core values should be incorporated into all areas of business? Write down as many values as you can think of that are near and dear to your heart.
3. Once you have compiled a significant list of values, take the time to narrow the list of values listed above into “top 5” list below.

Step 2: Mantra

1. Who are you? In five words or less, describe what business you are in.

Step 3: Vision Statement

1. In one paragraph, create a verbal picture of what you would like your company to look like in _____ years (Best to look 3-5 years out)

Step 4: Mission Statement

1. In one paragraph, dissect your Vision Statement into one third, and explain what will be accomplished within that timeframe.

Step 5: S.W.O.T. Analysis - Write one paragraph each that describes your strengths

Strengths-	Weaknesses-
Opportunities-	Threats-

Step 6: Critical Goals — Write six to twelve goals that need to be accomplished to accomplish your Mission Statement, so that you are better prepared to reach your Vision. Remember to make these goals S.M.A.R.T.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

A hand-drawn dollar sign on a notebook page. The dollar sign is filled with diagonal hatching lines. A hand is visible on the left side of the page, holding a black pen. The background shows a notebook, a cup of coffee, and some green leaves.

Section 2

Marketing and Sales Planning
Template

Marketing and Sales Questions to Discuss

*Before starting your Marketing and Sales Plan, decide whether your organization has
Clients or Customers? Patients or Members?*

We will treat our customers within our organization as _____.

Step 1: Clearly define the products or services that your organization provides:

Step 2: Who is your target market?

Geographic:

Demographic:

Psychographic:

Behavioristic:

Step 3: How will your organization market to existing and new customers or clients?

Step 4: What is your unique selling proposition (USP)?

Step 5: What is your competitive edge? Why should a consumer pick you over your competition? How have you differentiated yourself from the competition?

Step 6: How will your organization sell to existing and new customers and clients?

A background image showing a business meeting. Two people in dark blue suits are shaking hands over a desk. In the foreground, a woman with dark nail polish is holding a pen and looking at documents. There is a laptop, a pen, and some papers on the desk. The scene is brightly lit, suggesting an office environment.

Section 3

Customer Care Program Template

Customer Care Questions to Discuss

Our organization has _____! (Clients or Customers)

Step 1: What are the steps to the sales process within your organization? Create a chronological order from when a customer or client enters into the sales cycle and explain each step to the conclusion of the sales cycle.

Step 2: Are there opportunities to implement additional points of positive contact within your sales cycle? What opportunities present themselves?

Step 3: Are your customers or clients *Raving Fans*? If not, what can be done to implement additional strategies to ensure their satisfaction? If so, what specifically is being done?

Step 4: Do you have a way to measure the current level of customer satisfaction? How? What could your organization add to measure it?

Step 5: Has your organization created a low cost customer retention program? What could be done differently to retain existing and new customers?

Step 6: How does your organization inspire existing customers or clients to refer their friends, family, and acquaintances to your company? What could be added bolster referrals?

Step 7: Has your organization created specific systems and procedures, as well as developed a training program for your employees on how to follow these procedures to create WOW! service to your consumers? When and how will this be done?

Step 8: Are the leaders within your organization leading by example by taking care of the internal customers (the employees)?

Step 9: How can you include everyone within your organization to take customer service seriously, in an effort to increase repeat sales and referrals to other potential buyers?



Section 4

Financial and Profitability Planning Template

Financial and Profitability Questions to Discuss

Step 1: Does your organization have an accounting system that is up to date? Is it time to upgrade your version of your software program?

Step 2: Are the appropriate people in touch with the financial situation within the organization? Is there a process to review daily, weekly, monthly, or quarterly the Profit and Loss, Balance Sheet, Account Receivables & Payables, as well as the Cash Flow statements? How often do you meet with your financial advisors, accountants, and insurance agents?

Step 3: Does your organization have your policies on the financial management systems in writing? Including but not limited to yearly capital expenditures, budget, credit, collection, and invoice payment policies, and other policies that are pertinent to your business model? When will these systems be in writing and created as policy?

Step 4: What are the goals of your organization for the gross and net profits?

Step 5: What opportunities are available for the appropriate personnel to be current with bookkeeping and financial knowledge?

Step 6: Is your organization maximizing the benefits for all employees including management and owners personal financial gain through the business? Including cafeteria plans, health reimbursement accounts, 401k, and IRA's, etc.? What could be done differently to lower payroll taxes, personal taxes, and business liabilities?

A close-up, shallow depth-of-field photograph of a person's hand holding a smartphone. The hand is wearing a silver metal-link wristwatch. The background is softly blurred, showing a laptop screen, a brown ceramic cup, and a small potted plant on a desk. The overall lighting is warm and professional.

Section 5

Human Resource Planning Template

What Managers Think Employees Want

What Employees Really Want

1	Good Pay	5
2	Job Security	4
3	Promotion and Growth	6
4	Good Working Conditions	7
5	Interesting Work	1
6	Tactful Discipline	10
7	Loyalty to Employees	8
8	Full Appreciation of Work Done	2
9	Help with Personal Problems	9
10	Feeling of Being in on Things	3

Human Resource Questions to Discuss

Step 1: What is the cost of hiring and training a new employee within your organization?

Step 2: Does your organization have an appropriate human resource plan in place? Including policies and procedure manuals, and training manuals? Have they been updated?

Step 3: Are there updated and written job descriptions and productivity guidelines for each position within your organization?

Step 4: Has your organization developed and posted an organizational chart? What would this chart look like in your organization?

Step 5: When was the last time that your company reviewed the benefit plan? Is it competitive and in line with what the company can afford? What improvement can be made, and how does it compare and correlate with the financial and profitability plan?

Step 6: Is your organization giving the employees the training and development that they need and want to achieve their goals?

Step 7: While it has been proven to retain employees, increase awareness, and reduce the number of sick days taken, is your organization interested in creating a plan that promotes and improves the health and happiness of the employees?

A close-up photograph of a person in a dark blue pinstriped suit jacket, white shirt, and dark tie. The person's hands are visible, adjusting the tie. They are wearing a light-colored watch with a brown leather strap on their left wrist and a gold ring on their right hand. The background is blurred.

Section 6

Personal Development Program Template

Personal Development Questions to Reflect Upon

Step 1: Mental Development – How can you develop your mind, and what activities could you begin or continue doing?

Step 2: Physical Development – How can you develop your body, and what activities could you begin or continue doing?

Step 3: Social Development – How can you develop yourself socially, and what activities could you begin or continue doing?

Step 4: Financial Development – How can you improve your finances, and what activities could you begin or continue doing?

Step 5: Family Development – How can you spend more quality time with your family, and what activities could you begin or continue doing?

Step 6: Spiritual Development – How can you develop your mind, body, and spirit? What activities could you begin or continue doing?



Section 7

Simplified Ethical Standards Development
Template

Developing a Sound Formal Code of Ethics Workbook Exercise

Step 1: Is it appropriate for your organization to develop a Code of Ethics? Is it for your employees, customers, vendors, or everyone that does business with you?

Step 2: What is important to address when developing your Code of Ethics? Why?

Step 3: After reflecting on the previous questions, start developing your Code of Ethics within this section? You may then test them against the eleven steps discussed previously as paraphrased from the text *Ethics in Human Communication* (Johannesen, 2002, pp. 180-182).

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Sample Business Plan Outline:

Executive Summary

Business Concept

Business Model

Market Need

Competition

Management

Target Market/ Marketing

Operations

Funding Needs

Exit Strategy

Company Background

Company Description

Company Ownership

Key Management

Trademarks, Copyright, and

Other Intellectual Property

Company Location

Company History

Industry Overview

Industry overview

Market drivers/ Factors

Driving Demand

Industry Trends

Size and Growth

Buying Patterns

Regulatory Issues

Barriers to Entry

Maturity of Industry

Global Economic Factors

SWOT Analysis

Target Market

Customer Groups

Demographics

Psychographics

Competition

Competitive Positions/
Competitive Advantage
Direct Competitors

Indirect Competitors
Competitor Matrix

Operations

Workflow Summary

Operation Process

Operations Strategy

Management Summary

Staffing Needs

Management team

Advisory Board

Organization Chart

Financials

Sales Projections

Income Statement

Balance Sheet

Cash Flow

Capital Assets

Break-even

Funding Need

Summary

Summary

Expansion Opportunities

Keys to Success

Funds Sought

Contact Information

Appendix



Advancing Small Business is Our Business.

- ✓ free **consulting**
- ✓ practical **training**
- ✓ business **resources**
- ✓ business **recovery + continuity**

pikespeaksbdc.org

