

# ***Business plan template***

*If you're considering establishing or purchasing a small business, it's important that you have a business plan.*

*A plan will help provide you with an essential road map for your new business. It will also provide you with benchmarks against which you can measure the success of your activities as you build your business.*

*The following template will help you generate a tailored business plan that's right for your business.*

## ***How to use this business plan template***

*Your business plan can be a project portfolio for gaining investment, a road map to follow, a handy benchmark for your performance, or your first official introduction to major business partners.*

*To get started, simply answer the questions and fill in the fields where required. If you get stuck, there is a help section at the end of the template. Hover or click on the numbered link next to the section titles to navigate to each help topic for suggestions and extra tips.*

## Business profile

### Business name

### Business structure

### Business owners

### Date established

### Date registered

### Business registration number

### Business address

Postal:

Physical:

### Contact details

DD:

Mobile:

Email:

### Online presence

Website:

Facebook page:

Twitter account:

Blog:

## Executive Summary

## Background

### History

### Objectives

### Products and services

### Patents and trademarks

### Location

## Goal setting

## Summary of future plans

## Short-term goals

### Target date

[illegible]

## Long-term goals

## Target date


## Management, team and support

## Management structure

[illegible]

## Key personnel details

**Name**

**Role**

**Experience**

**Qualifications**

**Specialist area**

**Name**

**Role**

**Experience**

**Qualifications**

**Specialist area**

**Name**

**Role**

**Experience**

**Qualifications**

**Specialist area**

**Vacant positions**

**Business support  
networks**

**Organisational structure**

<b>Name</b>	<b>Position/responsibility</b>	<b>Reports to</b>

**Recruitment  
policies**

## Market research

### Primary research undertaken so far

### Secondary research undertaken so far

### Future research required

## Competitor research

### Competitor 1

#### Their strengths

#### Their weaknesses

#### How we will compete with them

### Competitor 2

#### Their strengths

#### Their weaknesses

#### How we will compete with them

**Competitor 3****Their strengths****Their weaknesses****How we will compete with them****Competitor 4****Their strengths****Their weaknesses****How we will compete with them**

## SWOT analysis

### Strengths

	<p>I will take advantage of my strengths by:</p>
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### Weaknesses

	<p>I will minimise my weaknesses by:</p>
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## Opportunities

	<p>I will take advantage of my opportunities by:</p>
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## Threats

	<p>I will minimise my threats by:</p>
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## Market overview

## Market description

## Market size

## Market structure

## Market opportunities

## Future markets

Local

National

International

## Target market

### Target market description

### How we will meet the target market's needs

### Factors influencing purchasing habits

## Marketing

### Marketing strategy

Marketing budget

\$

## Financial plan

### Start-up costs summary

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### Date you will break even

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### Sources of funding

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### Profit and loss forecast summary

	1 year	2 years	3 years
Overall sales forecast	\$	\$	\$
Overall costs forecast	\$	\$	\$
Overall profit/loss forecast	\$	\$	\$

### Cash flow forecast summary

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### Balance sheet forecast summary

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## Compliance

### Legal and regulatory considerations

#### I have carried out the following:

- ☐ Confirmed my legal structure (Sole trader, Partnership, Company)
- ☐ Registered for GST
- ☐ Applied for a tax number
- ☐ Arranged for insurance cover
- ☐ Applied for patents or trademarks
- ☐ Applied for local licences and permits

Applied for verification with the following standards bodies and regulators specific to my industry:

### Insurance

## Operational factors

### Business premises

### Equipment

#### Requirements

#### Solutions

### I.T.

#### Requirements

#### Solutions

## **Orders**

### **Process of fulfilling orders**

### **Process for handling returned orders**

### **Process for data gathering**

### **Outline suppliers – who they are and what they supply**

## Exit planning

**Who will buy the business – family, employees, outside buyer?**

**Processes and documentation required**

**Timeline – define goals and plan milestones**

**Delegate – who will be taking control**

**Professional advisors**