

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

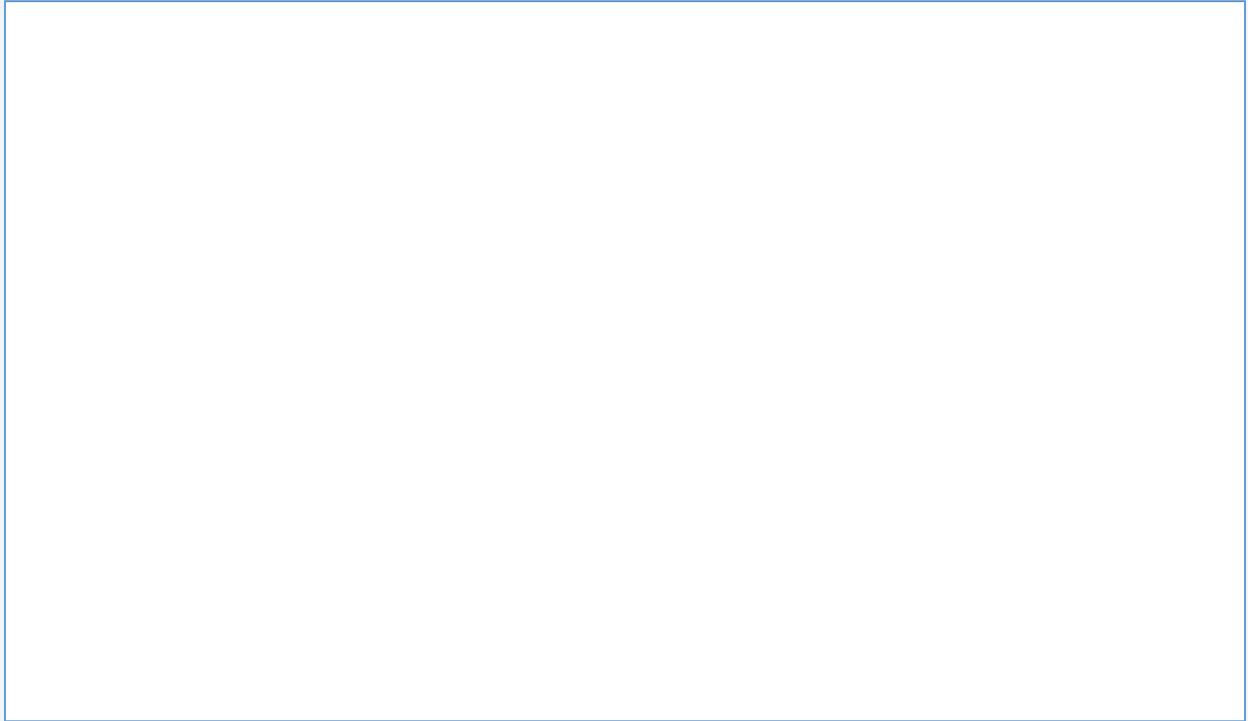
Website:

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

Short-term goals	Target date

Long-term goals

Target date

Long-term goals	Target date

Key personnel details

Name

Role

Experience

Qualifications

Specialist area

Name

Role

Experience

Qualifications

Specialist area

Name

Role

Experience

Qualifications

Specialist area

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