

Business Plan Format

1 Front Cover

Why not have a colourful front cover? Remember to include your business name, address, telephone and fax number, e-mail address and website if you have one. You could include your logo or an eye-catching picture of one of your products or services. Clearly indicate the period that is covered by the business plan.

2 Contents

It is important to have your business plan clearly laid out in sections and a contents page with headings and page numbers which will guide the reader quickly to a particular topic.

3 Executive Summary

Although found at the front of your business plan, this is usually the last section to be written and is quite literally a summary of your business plan, on either one or two pages. Remember, even if the reader has not read the full business plan, the executive summary should convey who you are and what you are planning to do.

4 Background Information

This is an opportunity to describe the history of your enterprise. Explain who is involved, what you do, where you are based, the area you cover, how you have developed, significant milestones, relevant partners, etc.

5 Services and Products

Describe your products or services. Brochures, leaflets, posters, photographs, diagrams, plans, maps can be included either here or in the appendices and referred to in the text.

6 Marketing Plan

This is a crucial part of any business plan. You will need to answer some of the following questions. Who are your customers? How do you know your customers want your products or services? How will you target your

customers? Who are your competitors? Will your products or services compliment any existing products/services? How have you arrived at your pricing structure? Where are your products/services placed in the market? What promotional and advertising activities will you undertake? Will you be able to move into a different or additional market?

Make reference to any demographic data, census information, surveys, questionnaires, relevant reports, local/central government/European policies, etc.

You could include the results of a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats affecting your business). How will you minimise the weaknesses and threats and maximise the strengths and opportunities? Also include a PESTLE analysis (Political, Economic, Social, Technological, Legal and Environmental factors affecting your business). How will these issues impact on your products and services?

7 Operational Plan

Here you can describe the details of exactly how you will deliver your services or products. Put in as much detail as possible about how your product or service is constructed and how/where/by what means the customer actually receives the product or service. What days and times are involved and any peak and low operational periods. Look ahead and describe how the business will develop by illustrating your short, medium and long-term goals.

In this section you can include what resources are needed. This covers staff (the number, roles, training and recruitment), premises and facilities, and all necessary equipment and materials.

If you have any policies and procedures for how you will operate, these can be referred to and included in the appendices. For example, equal opportunities, employment practices, health and safety, customer care, etc.

You might like to summarise the critical factors for success in your business.

8 Management Plan

It is probably a good idea to start off by describing the legal structure for your democratically managed social enterprise. You also need to explain the internal management structure. Describe the staff roles and any skills, experience and qualifications which will be necessary. Address any skill gaps by including a training plan. What are the line management arrangements? Outline any procedures for staff accountability, supervision and support. Include any policies and procedures for volunteers if these are relevant to your business. The use of diagrams can be useful in this section.

9 Financial Plan

This is the vital part of your business plan and often the section which is referred to before anything else! This is your chance to show that your social enterprise is sustainable and will not collapse after any initial funding has disappeared. By completing the other sections of the business plan you should have already arrived at most of your costings, these can now be illustrated through budgets for year one and two and a two year cash flow forecast.

The year one forecast should include your start up costs and demonstrate how your income will build up as your sales increase. Careful calculations are needed to ensure that the sales are realistic and viable. Remember to include a page detailing the assumptions on which your forecast is based.

It is also important to include details of the financial systems you will use, particularly the controls on those systems. Who will sign cheques? What information will be used to make financial decisions in the business? What safeguards will you establish to account for and monitor income and expenditure?

10 Appendices

You can include here any documents that are too detailed or bulky to go in the main body of the text. These could include some of the following:

- Brochures
- Leaflets
- Photographs
- Diagrams

- Maps
- Market research information
- Questionnaires
- Surveys
- References
- Brochures
- Professional advisors
- Job descriptions, if relevant
- Other supporting material relevant to your social enterprise