



Business Plan Guidelines

Contents

- 1. Executive summary**
- 2. Business Description**
- 3. Industry**
- 4. Product Definition**
- 5. Market Definition**
- 6. Marketing Strategy**
- 7. Competition**
- 8. Operations & Management**
- 9. Financial Components**

1. Executive summary

- **What is the nature of your business**
- **What products will be offered**
- **Who will be your target market**
- **Is this a new or existing business**
- **If an existing business, how long has it been in operation for**
- **Where will the business be based**
- **What is the Shareholding and Management structure of the business**
- **What are the short & long term goals of the business**
- **What is the owners cash contribution towards this business going to be**
- **What is the ideal funding requirement from the bank (how much are you looking to borrow)**
- **What security will you be offering for the loan**

2. Business Description

- **Under what legal entity is the business going to be trading under, and has this entity been registered**
- **What sector does the business fall into (wholesale, retail, food, service, etc..)**
- **Where is the business located (address)**
- **What sort of premises will the business be operating from (shopping centre, warehouse, owners residence, etc)**
- **Reason for choosing these particular premises**
- **What zoning is allocated to the business address**
- **Does the business address comply with the allocated zoning**
- **Will a Lease Agreement be signed, if so, what are the terms and conditions**
- **What is the monthly rentals payable**

3. Industry

- **What is the present state of the industry and how has it fared over the last 5 years (growth/decline)**
- **What are the future prospects for the industry**
- **What problems can you see**
- **How can these problems be overcome**

4. Product Definition

- **What is the product mix of the business**
- **Why would customers be attracted to your products (quality, reliability, price, etc)**
- **What gives your product the competitive edge over your rivals**

5. Market Definition

- Who is your target market (age, income, etc)
- What growth patterns can you see emerging with regard to the make-up and size of your market (expansion geographically, new customers, etc)

6. Marketing Strategy

- Provide a clear indication as to what your marketing strategy is going to be, over and above the involvement from the Franchisor

7. Competition

- Identify and list the major competitors in your area (use table below as guideline)

Name	How long have they been in business	Products / Services provided
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- What key success factors do the competitor demonstrate
- Can you identify any weakness in the competitors business operations
- What skills will be necessary in order to allow you to have the competitive advantage in your area

8. Operations & Management

- Do you foresee any industry changes occurring that will affect the way your business operates and how will these changes impact your business
- Who are the key players in the organisational structure of your business
- Give us a brief overview on the staffing requirement of your business:
 - Management
 - Staff

9. Financial Components

- Existing business:
 - Latest available Audited Financial Statements
 - Updated Management Accounts
- New business:
 - Projected cashflow with a minimum term of 36 months (See attached spreadsheet)