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The template should be adapted to your business project, not the other way around! It is supposed to help you, not make things more complicated.

We suggest that you follow the template even if, for the time being, some of the sections contain only partial information or summary statements. Once you have finished the first draft of your plan, reviewing it will allow you to finalize these sections with further details.

We also suggest that you eliminate tables and lines in tables that you do not need. Sometimes it may make more sense to erase a table and replace it with a written statement.

Your business plan should be 20 to 30 pages long. We suggest the following distribution of pages, but it may vary somewhat, depending on the type and complexity of your project:

Project summary: 1 page

Chapter 1: 3 to 4 pages

Chapter 2: 3 to 4 pages (include a more detailed market study in the appendices if necessary)

Chapter 3: 3 to 4 pages (include a more detailed marketing study in the appendices if necessary)

Chapter 4: 3 to 4 pages (include a more detailed operational plan in the appendices if necessary)

Chapter 5: 2 pages for explanatory notes (appended financial statements)

Chapter 6: 1 to 2 pages

Appendices: no limit

Some supporting details for your business plan should be included in the appendices. For some projects, it may make more sense to present the appendices in a separate document.

VENTURE NAME

NAME OF PROMOTER(S)
ADDRESS
(complete address and phone number)

BUSINESS PLAN

DATE OF CREATION OR UPDATE

PROJECT SUMMARY

Begin your text here.

Project	Financing
Capital assets: Opening inventory: Start-up costs: Required working capital:	Financing acquired and expected investments: Grants: Local funds: Loans and line of credit:
	Internally generated funds:

Total:	Total:

TABLE OF CONTENTS

PROJECT SUMMARY

1 PLANNING AND GENERAL MANAGEMENT

1.1 Mission

1.2 Business offer

1.3 Promoter(s) and business team

1.3.1 Division of responsibilities

1.4 Corporate structure

1.4.1 Legal form of the business

1.4.2 Division of ownership

1.5 Company objectives

1.6 Timetable of activities

2 MARKET STUDY

2.1 Overall market analysis

2.2 Sector analysis

2.3 Comparative analysis of the competition

2.4 Target market analysis

2.5 SWOT analysis (strengths/weaknesses/opportunities/threats)

Start your text here

2.6 Action plan

2.7 Competitive advantage

2.8 Positioning

3 MARKETING PLAN

3.1 Product strategy

3.2 Location and distribution strategy

3.3 Price strategy

3.4 Communications strategy

4 OPERATING PLAN

4.1 Operating strategy

4.2 Production process/service delivery

4.3 Resources required

5 PROJECTED FINANCIAL STATEMENTS

CALCULATION ASSUMPTIONS

5.1 Project cost and financing

5.2 Sales and sales breakdown

5.3 Purchases and purchase breakdown

5.4 Cash budget

6 RISK ANALYSIS AND ALTERNATIVE STRATEGIES

APPENDICES

1.

1 PLANNING AND GENERAL MANAGEMENT

1.1 Mission

Begin your text here.

1.2 Business offer

Begin your text here.

1.3 Promoter(s) and business team

Begin your text here.

1.3.1 Division of responsibilities

Responsibility	Partner
Planning and general management	
Marketing	
Production	
Research & Development	
Support services	

1.3.1 External resources

1.4 Corporate structure

1.4.1 Legal form of the business

Begin your text here.

1.4.2 Division of ownership

Partners' names	Investment		% ownership
	In cash	Asset transfer	

1.5 Company objectives

General objectives (Year 1):	Specific objectives
Marketing plan	- - -
Operating plan	- - -

Financial projections	- - -
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General objectives (Year 2):	Specific objectives
Marketing plan	- - -
Operating plan	- - -
Financial projections	- - -

General objectives (Year 3):	Specific objectives
Marketing plan	- - -
Operating plan	- - -
Financial projections	- - -

1.6 Timetable of activities

See appended calendar.

2 MARKET STUDY

Append the dashboard approved by your counsellor.

2.1 Overall market analysis

Variables	Restrictions	Opportunities
Political/legal		
Economic		
Socio-cultural/ demographic		
Technological		
Environmental		

2.2 Sector analysis

2.3 Comparative analysis of the competition

Introduction:

Selection of analysis criteria:

-
-
-
-

Competitors	Strengths	Weaknesses	Competitive advantage
Competitor 1	- - - -	- -	- -
Competitor 2	- - - -	- -	- -
Competitor 3	- - - -	- -	- -
Competitor 4	- - - -	- - -	-

Inspirational competitor(s):

2.4 Target market analysis

Primary segment:

Percentage of first-year earnings generated by the segment

Segment profile:

Target territory:

Buying behaviour:

Number of clients needed to achieve target earnings for this segment:

Secondary segment:

Percentage of first-year earnings generated by the segment

Segment profile:

Target territory:

Buying behaviour:

Number of clients needed to achieve target earnings for this segment:

2.5 SWOT analysis (strengths/weaknesses/opportunities/threats)

Start your text here .

Strengths	Weaknesses
Opportunities	Threats

2.6 Action plan

2.7 Competitive advantage

2.8 Positioning

3 MARKETING PLAN

3.1 Product strategy

Begin your text here.

3.2 Location and distribution strategy

Begin your text here.

3.3 Price strategy

Begin your text here.

3.4 Communications strategy

Begin your text here.

4 OPERATING PLAN

4.1 Operating strategy

Begin your text here.

Function	Tasks	Duration	Overseen by	Executed by
General management				
Research & Development				
Marketing				
Sales				
Production				

Administration				

4.2 Production process/service delivery

Begin your text here.

4.3 Resources required

- Information

Begin your text here.

- Human

Begin your text here.

- Suppliers

Begin your text here.

- Material and financial

Begin your text here.

2. **5 PROJECTED FINANCIAL STATEMENTS**

CALCULATION ASSUMPTIONS

5.1 Project cost and financing

Begin your text here.

5.2 Sales and sales breakdown

Begin your text here.

5.3 Purchases and purchase breakdown

Begin your text here.

5.4 Cash budget

Begin your text here.

3. **6 RISK ANALYSIS AND ALTERNATIVE STRATEGIES**

APPENDICES

- Detailed CV of each promoter
- Timetable of activities
- Market study dash board (bibliography)
- Survey questionnaire and results
- Letters of intention – Invoicing
- Shareholders' agreement, if applicable
- Commercial lease, if applicable
- Actual income statements, if applicable
- Any other relevant document

APPENDIX - Timetable of activities

[illegible]

APPENDIX - Dash Board – Market Study

i. Websites consulted:

1. _www._
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

ii. Works consulted: (title, author, year of publication)

- 1.
- 2.
- 3.
- 4.
- 5.

iii. Experts met: (name, title, organization)

- 1.

2. _____
3. _____
4. _____
5. _____

iv. Questionnaire: (append a copy)

Number of respondents: ____

Date of survey: _____ 20__

Location: _____

Type of survey: ____ Phone ____ Face to face ____ Internet

Other details: _____

v. Other (associations, organizations, etc.):

1. _____

2. _____

3. _____

vi. Competition:

Name: Address: Phone: () -	____ Call ____ Visit ____ Other: _____	Date
Name: Address: Phone: () -	____ Call ____ Visit ____ Other: _____	Date
Name: Address: Phone: () -	____ Call ____ Visit ____ Other: _____	Date

Name: Address: Phone: () -	_____ Call _____ Visit _____ Other: _____	Date
Name: Address: Phone: () -	_____ Call _____ Visit _____ Other: _____	Date

Solicitation Chart													
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Total
Number of calls													
Number of meetings													
Number of bulk sales													
Sales projections													

Appendix

SOLICITATION PLAN

Communications strategy													
Means	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Budget

CLIENTS TO SOLICIT

PREPARATION FOR PHONE SOLICITATION					CALL	CALL RESULTS			
COMPANY NAME	COMPANY ADDRESS	CONTACT PERSON	TITLE/ FUNCTION	PHONE	DATE AND TIME	MEETING	REMINDER DATE	TRANSFER	OTHER

{Signalization tools}



{symbol for process/status updates - use this to signal important milestones in the process}



{symbol for notes - use this to post reminders or short messages for self or to collaborators}



{symbol for important information - use this to attract collaborators' attention}



{symbol for ToDos - use this to signal to your collaborators about what they can do}



Alternatives

The Alternatives box enumerates possible solutions to consider.

...



Reasoning

The Reasoning box presents arguments about possible choices.

...



Information

The Information box tells you how stuff works.

...



Growing consensus

The Growing consensus box is a summary of a section of this report

...