

BUSINESS PLAN TEMPLATE

INTRODUCTION

Purpose of this Document

Example: The purpose of this document is to provide a central source of information relating to the business focus for the Southeast operation for 2012. The business plan is also designed to communicate a vision and direction for the Southeast operation over the next 6-12 months as the organization continues to aggressively pursue increasing opportunities. The 2012 Business Plan should service as a roadmap for the operation as it defines and implements the tactical and strategic steps needed to achieve its goals.

EXECUTIVE SUMMARY

Business Overview

Examples:

- Sales have been declining
- Competition has been increasing
- Economic conditions are turning around

Key Findings

Examples:

- Low morale
- Lack of in-depth industry expertise
- High attrition

Recommendations

Example: The Southeast operation defined challenging but attainable goals. In striving to achieve all of these goals, the operation determined specific strategic plans to be implemented and monitored over the next 6-12 months. A summary of these strategies is as follows:

- Strategy #1: Reorganize business units along industry sectors
- Strategy #2: Retain Top Employees
- Strategy #3: Expand Vendor A Partnership
- Strategy #4: Terminate Vendor B partnership
- Strategy #5: Implement Process Improvement initiatives
- Strategy #6: Increase International Collaboration
- Strategy #7: Consolidate Data Centers
- Strategy #8: Revisit the Business Plan Quarterly

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BUSINESS PLAN METHODOLOGY

Approach to Developing the Business Plan

Southeast Operation Sources of Information

Examples:

- Questionnaire responses
- Interview results
- Focus Group results
- Sales collateral
- Performance reviews
- Sales reports
- Sales forecasts

Corporate Sources of Information

Examples:

- Annual report
- Marketing information
- Financial reports
- Partnership documentation

External Sources of Information

Examples:

- Industry benchmark reports
- Federal Reserve Economic indicator reports
- Local economic reports
- Economic analysis from various websites
- Competitive analysis reports

MARKET ANALYSIS

National Economic Trends

Examples:

- Gross Domestic Product (GDP) quarterly changes
- Dow Jones Industrial Average trends
- Inflation Trends
- Unemployment rates

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Southeast Economic Trends

Examples:

- Local unemployment rates
- New business openings
- Average salaries across industries

Industry-specific Trends

Examples:

- Manufacturing
- Financial Services
- Information Technology
- Food and Agriculture

SOUTHEAST CURRENT OPERATIONAL STATE

Southeast Operation Mission Statement

Primary Product and Service Offerings

Geographic Regions

Southeast Management Overview

Examples:

- Organizational Chart
- Average years of experience
- Average education levels

Southeast Operational Overview

Examples:

- Organizational Chart
- Average salaries
- Average years of service
- Average education levels

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SOUTHEAST OPERATION SWOT ANALYSIS

Strengths

Examples:

- Mature management and sales teams
- Solid customer base
- Strong reputation

Weaknesses

Examples:

- Lack of a vision
- Few employee incentives
- Low morale

Opportunities

Examples:

- Increased sales through partnerships
- Merger potential with company X
- Advanced employee leadership training

Threats

Examples:

- Attrition
- Competition entering into the local market
- Local economic conditions

SOUTHEAST VENDOR PARTNERSHIP ANALYSIS

Partnership #1

- Overview of the Partnership
- Challenges
- Opportunities
- Plans for moving forward

Partnership #2

- Overview of the Partnership
- Challenges
- Opportunities
- Plans for moving forward

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SOUTHEAST OPERATION FINANCIAL ANALYSIS

Financial Overview

Examples:

- Revenues
- Profit
- Expenses
- Accounts receivable

Financial Breakdown by Industry Sector

Financial Trends

Examples:

- Monthly
- Quarterly
- Yearly

Financial Forecasts

Examples:

- Sales / profit
- By industry sector
- New customers
- Existing customers

CUSTOMER ANALYSIS

Revenue by Customer

Top Customers by Vertical Market

Sales Pipeline

- Revenue potential
- Probability

COMPETITIVE ANALYSIS

Competitor #1 Overview

- Competitive Advantage
- Competitive Disadvantage
- Conclusion and Recommendations

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Competitor #2 Overview

- Competitive Advantage
- Competitive Disadvantage
- Conclusion and Recommendations

SOUTHEAST OPERATION GOALS

Examples:

- Achieve revenue of \$53.2 million.
- Achieve net profit of 30%
- Achieve less than 10% attrition annually.
- Increase partner business to 15% of total revenue.
- Train 90% of all managers in advanced leadership techniques
- Increase business in the healthcare sector by 20%
- Consolidate manufacturing facilities
- Increase unit production by 5%

SOUTHEAST STRATEGIES FOR ACHIEVING GOALS:

STRATEGY #1: REORGANIZE BUSINESS UNITS ALONG INDUSTRY SECTORS

Challenge

- *Example:* We haven't been able to build deep industry knowledge because our employees are stretched too thin along too many various industries. Employees are not able to spend the appropriate time and energy in acquiring deep industry knowledge for specific industries.

Strategy Statement

- *Example:* Reorganize the business units along industry sectors to encourage and facilitate deep industry knowledge, skills enhancement, industry collaboration and industry-specific brand recognition.

Action Plans

- *Example:* Deploy reorganizational task force to build out migration plan and oversee all reorganizational efforts

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Resources

- *Example:* All Vice-presidents and above meet weekly to review plans

Timeframes

Examples:

- Healthcare by Q2, 2012
- Financial Services by Q3, 2012
- All others by end of year, 2012

STRATEGY #2: RETAIN TOP PERFORMERS

Challenge

Strategy Statement

Action Plans

Resources

Timeframes

STRATEGY #3: EXPAND VENDOR A PARTNERSHIP

Challenge

Strategy Statement

Action Plans

Resources

Timeframes

THREATS AND RISKS TO ACHIEVING OUR GOALS

Examples:

- Attrition due to salary freezes
- Low morale due to lack of outside training
- Economic instability
- Sales turnover due to start-up companies
- Aging equipment
- Local military base closure
- Government cutbacks

BUSINESS PLAN SUMMARY / CONCLUSION