



NEW ZEALAND
TRADE & ENTERPRISE

Your Business Plan Template

YOUR COMPANY NAME / BRAND HEADER

CONTACT

DIRECT DIAL PHONE NUMBER:

POSTAL ADDRESS:

MOBILE PHONE NUMBER:

EMAIL ADDRESS:

PHYSICAL ADDRESS:

ONLINE:

WEBSITE:

GOOGLE+:

LINKED IN:

BLOG URL:

FACEBOOK:

YOUTUBE / VIMEO:

TWITTER

Chapter 1: Business

BUSINESS OVERVIEW

HISTORY

The background to the business to date:

Keep the history of your business brief; it will be of limited interest unless it helps to explain the current position of the business.

OBJECTIVES

What we plan to achieve in the short term and long term:

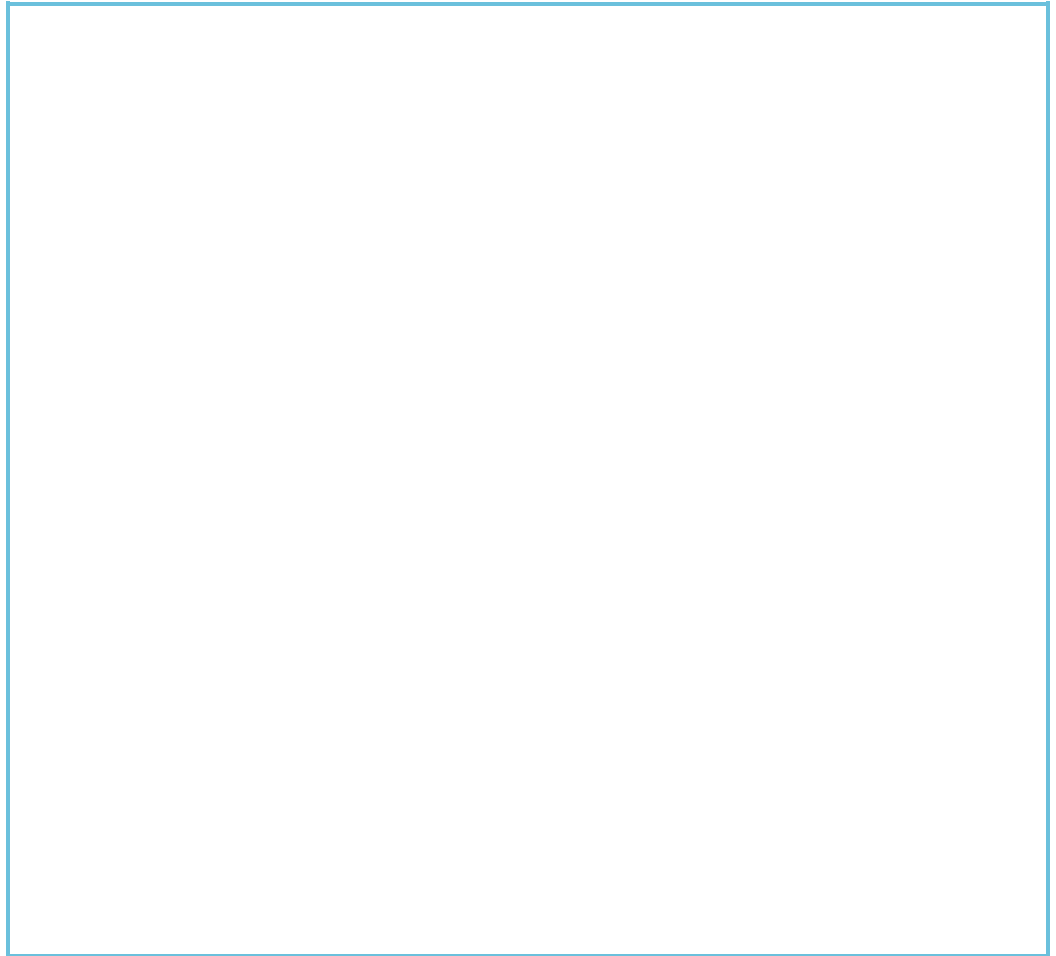
NEXT ONE TO TWO YEARS:

NEXT THREE TO FIVE YEARS:

PRODUCTS OR SERVICES

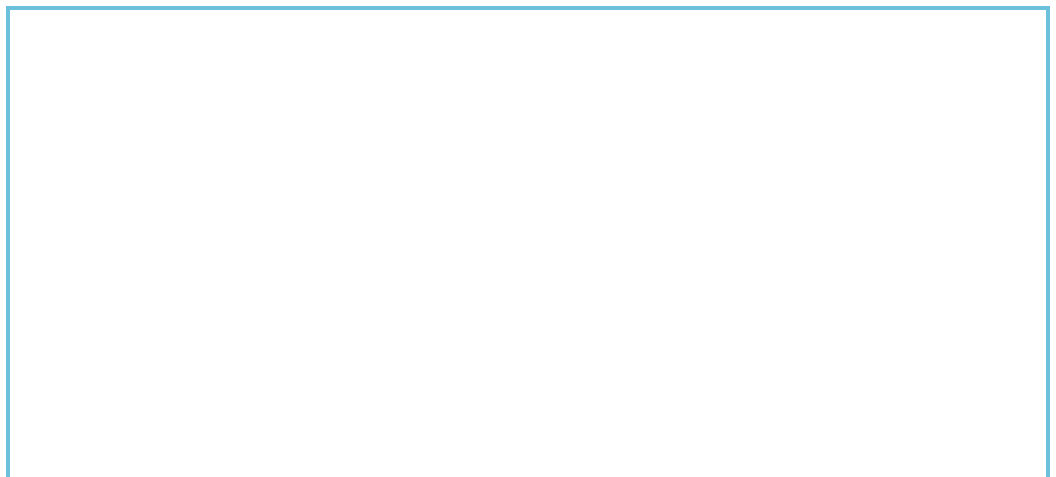
What we are offering customers:

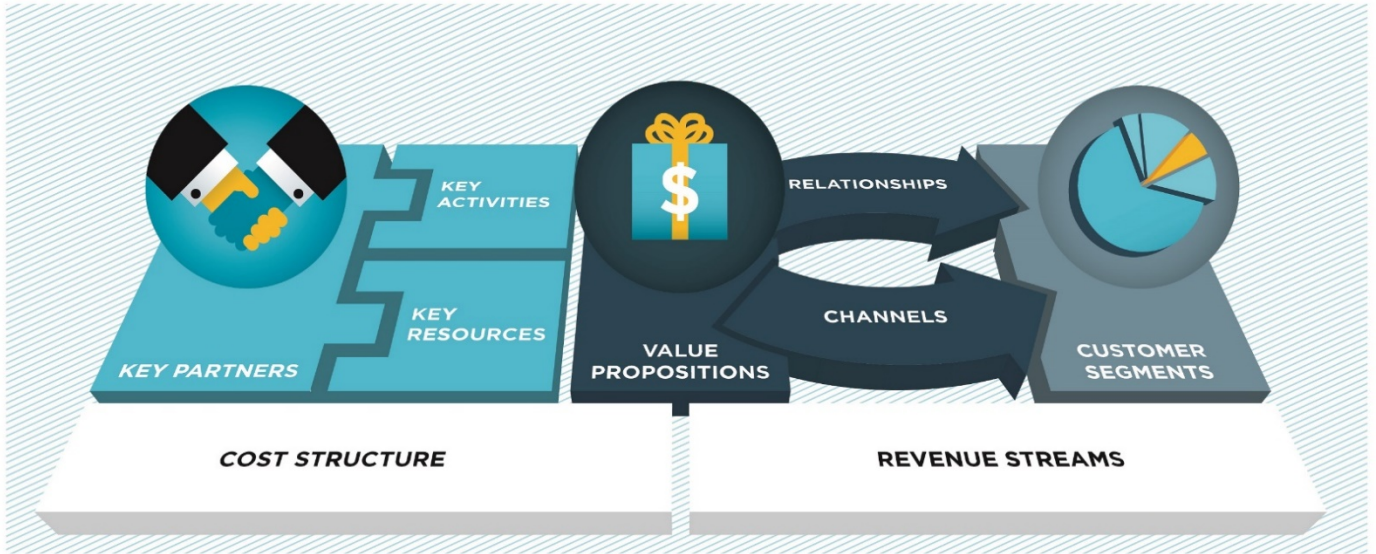
Ask a friend who knows nothing about the business to read this section. If the friend can't gain a clear idea of what you intend to do, rework your description.



GENERATING MONEY

An explanation of our business model (how the business will make money):





OUR KEY ACTIVITIES

Overview of your main activities.

REVENUE STREAMS

Products and services that will generate revenue.

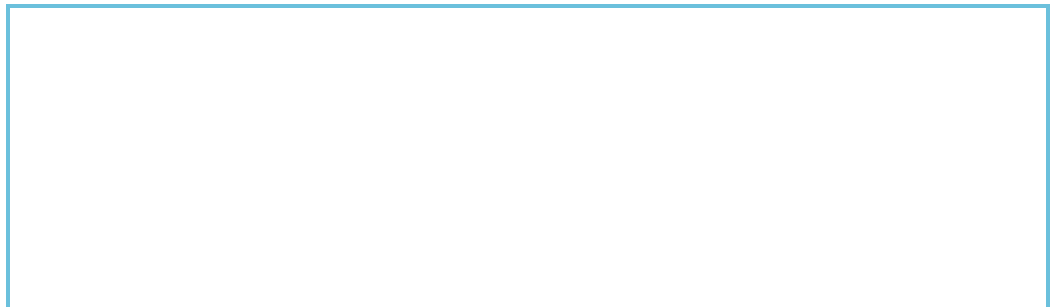
OUR KEY PARTNERS

Suppliers, subcontractors and other partners who help us produce and market our products and services.



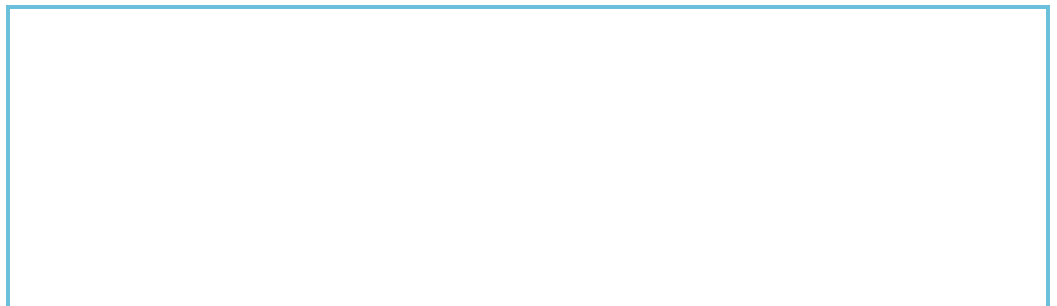
KEY RESOURCES

Resources critical to your success.



MARKET NICHE

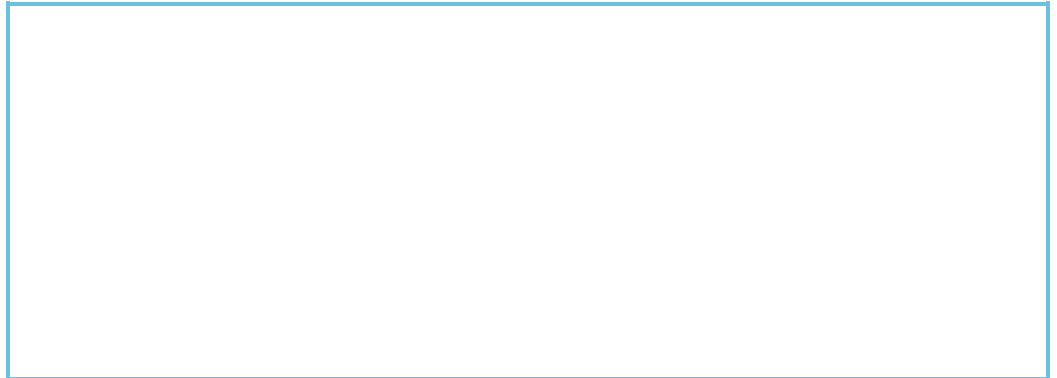
The market niche we have identified:



CORE COMPETITIVE ADVANTAGE

Our core competitive advantages – what we offer customers that our competitors don't:

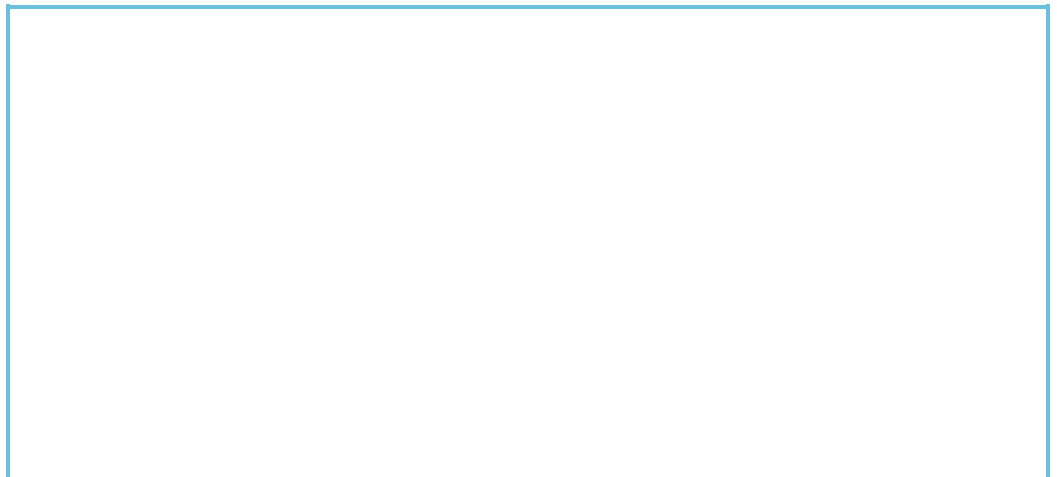
Explain why your value proposition(s) will give your business a durable advantage.



GETTING TO CUSTOMERS

Distribution channels we will use to reach our market:

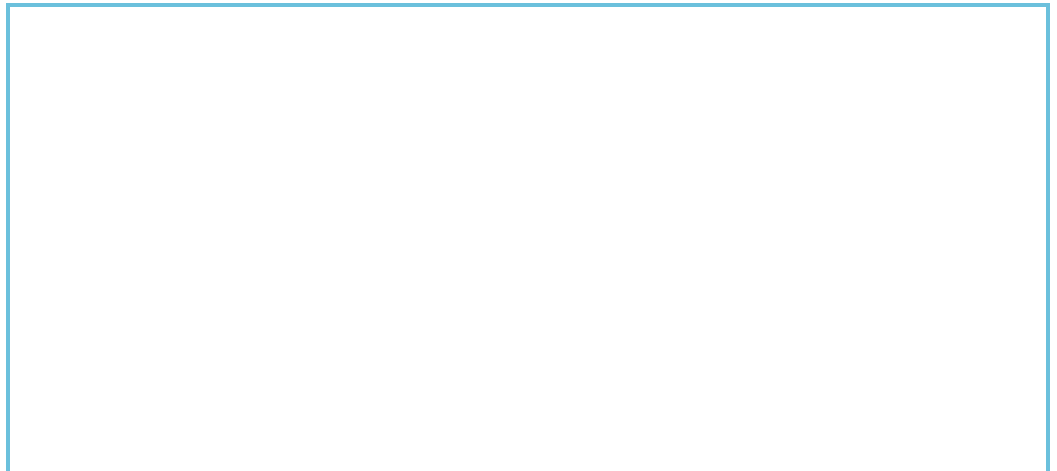
For example, shop, website, agents or distributors, wholesalers and retailers. Show that you will avoid channel conflicts, such as undercutting retailers with lower website pricing.



COMPLIANCE ISSUES

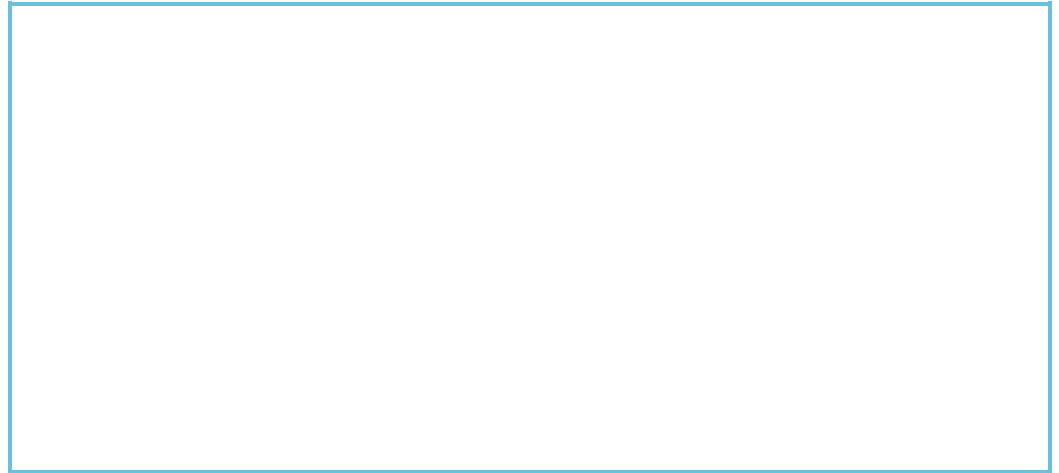
Compliance issues we have identified and how we have solved them or plan to solve them:

For example, licences, permits, health and safety requirements and resource consents.



BUSINESS STRUCTURE

Our choice of business structure
(for example, Sole Trader,
Partnership, Limited Liability
Company) and why we chose it:



Chapter 2: Strategy

BUSINESS GOALS

Our business goals (what do you want to achieve) in the short and long term:

Ensure your goals are specific and measurable.

OUR GOALS FOR THE NEXT 12 MONTHS

Specific tactics and stepping stones to these goals.

HOW WE PLAN TO ACHIEVE THESE GOALS

Explain how you will measure success.

WHAT SUCCESS WILL LOOK LIKE

Ensure your goals are specific and measurable.

GOALS FOR THE NEXT THREE TO FIVE YEARS

Specific tactics and stepping stones to these goals.

HOW WE PLAN TO ACHIEVE THESE GOALS

Explain how you will measure success.

WHAT SUCCESS WILL LOOK LIKE

KEY COMPETITOR ANALYSIS

Our key competitors' strengths and weaknesses, and how we plan to complete against them:

Cover your top three to five competitors.

COMPETITOR	STRENGTHS	WEAKNESSES	OUR RESPONSE
1:			
2:			
3:			
4:			
5:			

SWOT ANALYSIS

ANALYSIS OF OUR BUSINESS

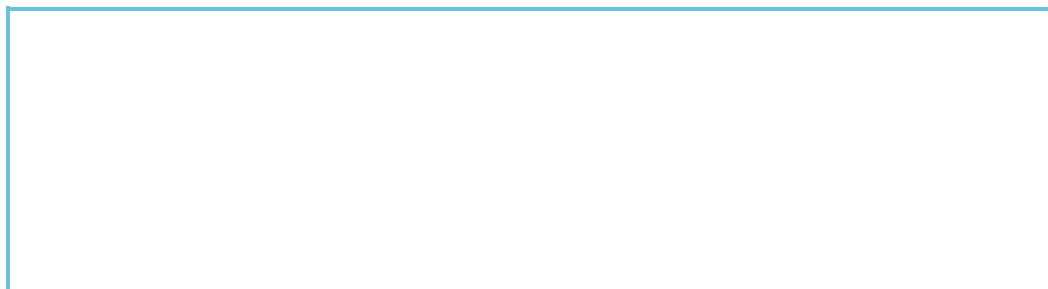
Include your advisors and key staff in this exercise. Refer to the lists in chapter two in the Planning for Success Guide on SWOT analysis to ensure you've covered the essentials.

	STRENGTHS	WEAKNESSES
EXTERNAL FACTORS		
CRITERIA TO CONSIDER	OPPORTUNITIES	THREATS

CORE VALUES

The core values that underpin our business:

Condense your values statement into one or two short sentences at most.



Chapter 3: Market

CUSTOMER AND MARKET PROFILES

Our customer types explained:

*Be as specific as possible in your
profiling.*

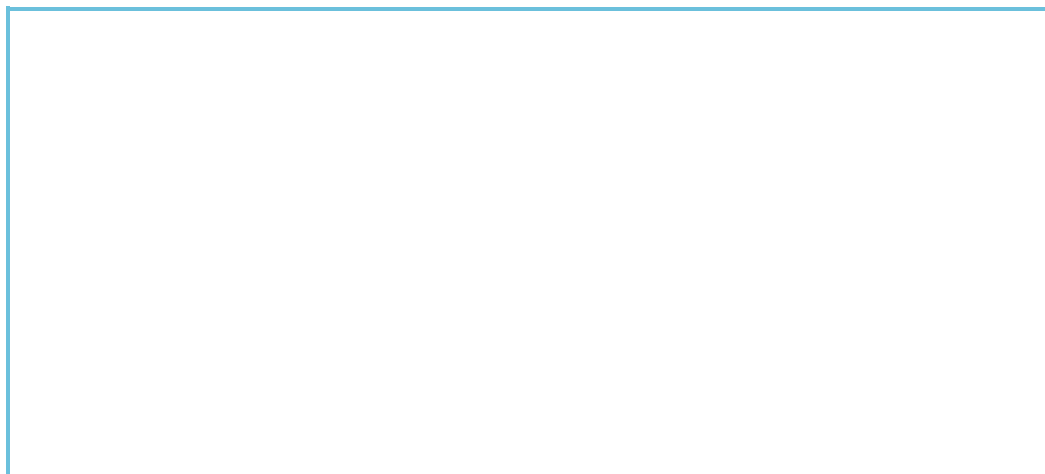
MARKET SEGMENT 1

MARKET SEGMENT 2

MARKET SEGMENT 3

VALIDATING DEMAND

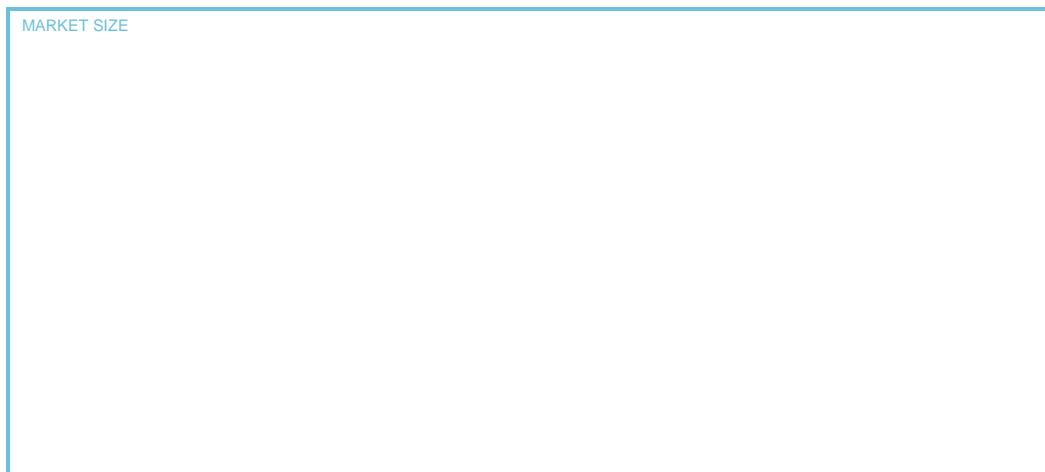
Our evidence of market demand:



MARKET SIZE AND SUSTAINABILITY

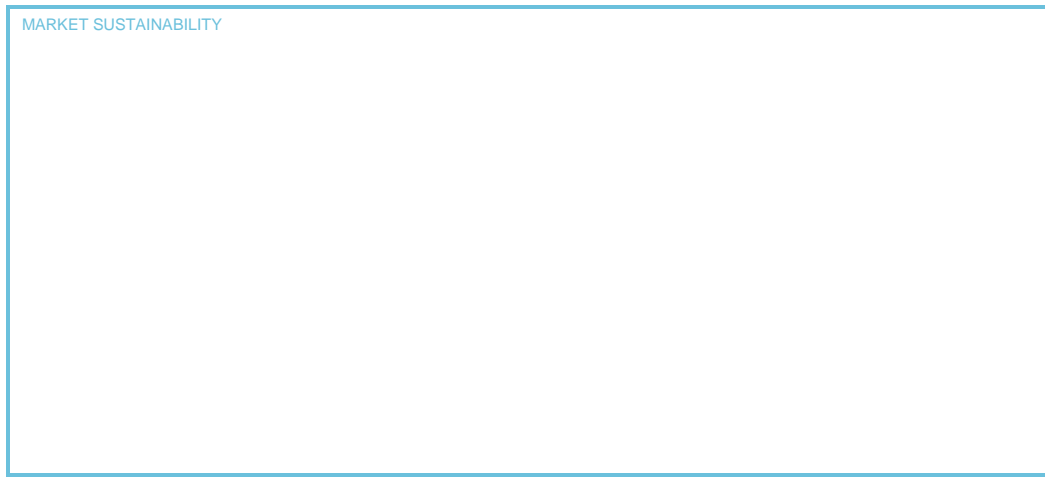
Our market research:

MARKET SIZE



If your business can be scaled, perhaps to overseas markets, then describe this extra potential, as it will be of particular interest to investors.

MARKET SUSTAINABILITY



Note any threats that could affect market sustainability, such as changing technology, competitor reaction to your market entry, or economic downturns. Describe how you might cope with these threats.

THREATS

PROMOTION PLAN

Our marketing strategy for the next 12 months:

- Marketing budget timeline attached.

BRANDING AND IP PROTECTION

How we are protecting our brand and intellectual property from being copied or damaged:

PROBLEM OR CONFLICT SOURCE	SOLUTION

Chapter 4: Skills, people and systems

SKILLS AND EXPERIENCE

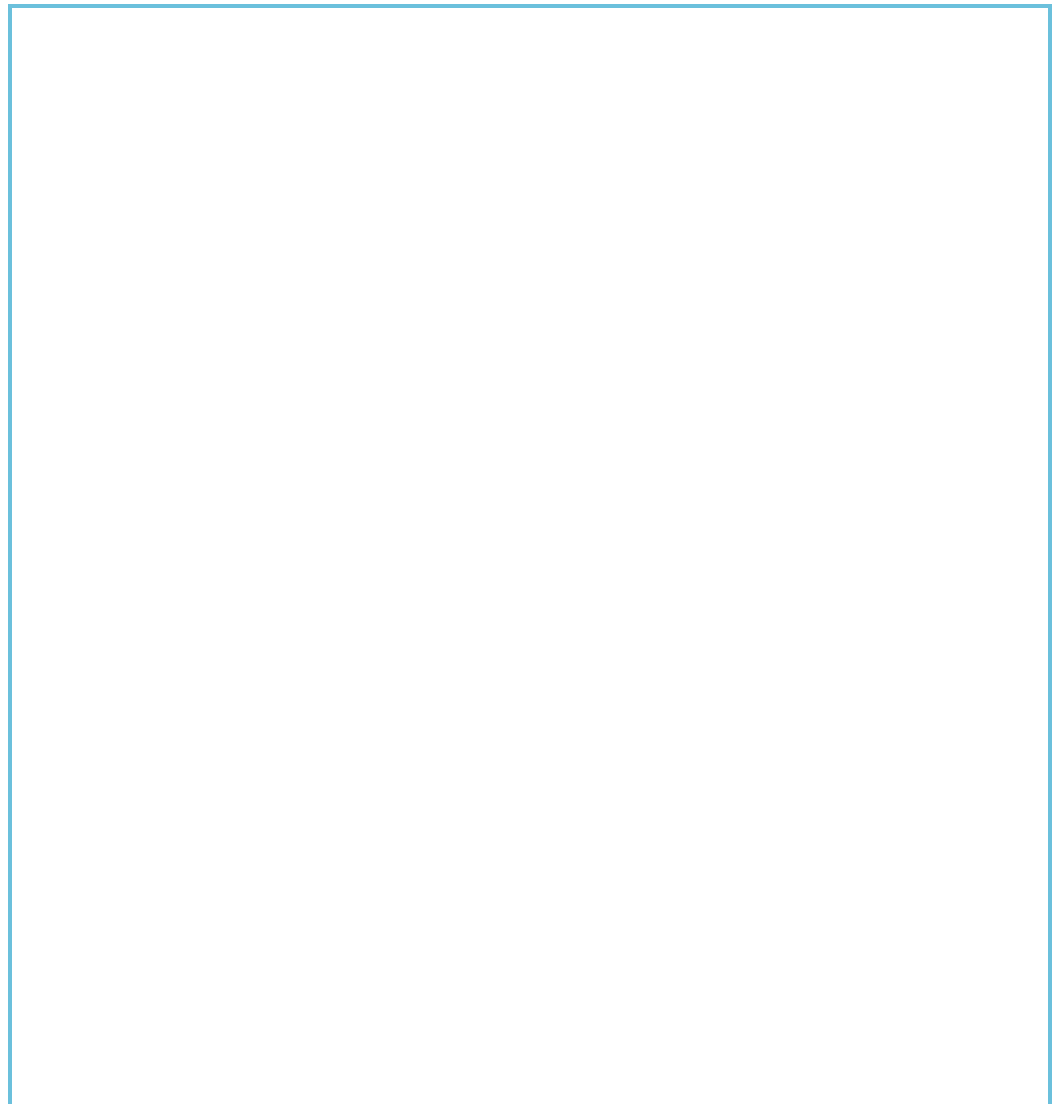
An outline of my skills, experience and qualifications:

If you lack business experience or qualifications then consider postponing your plans while you gain some experience by working in the industry you want to enter and taking some small business courses.



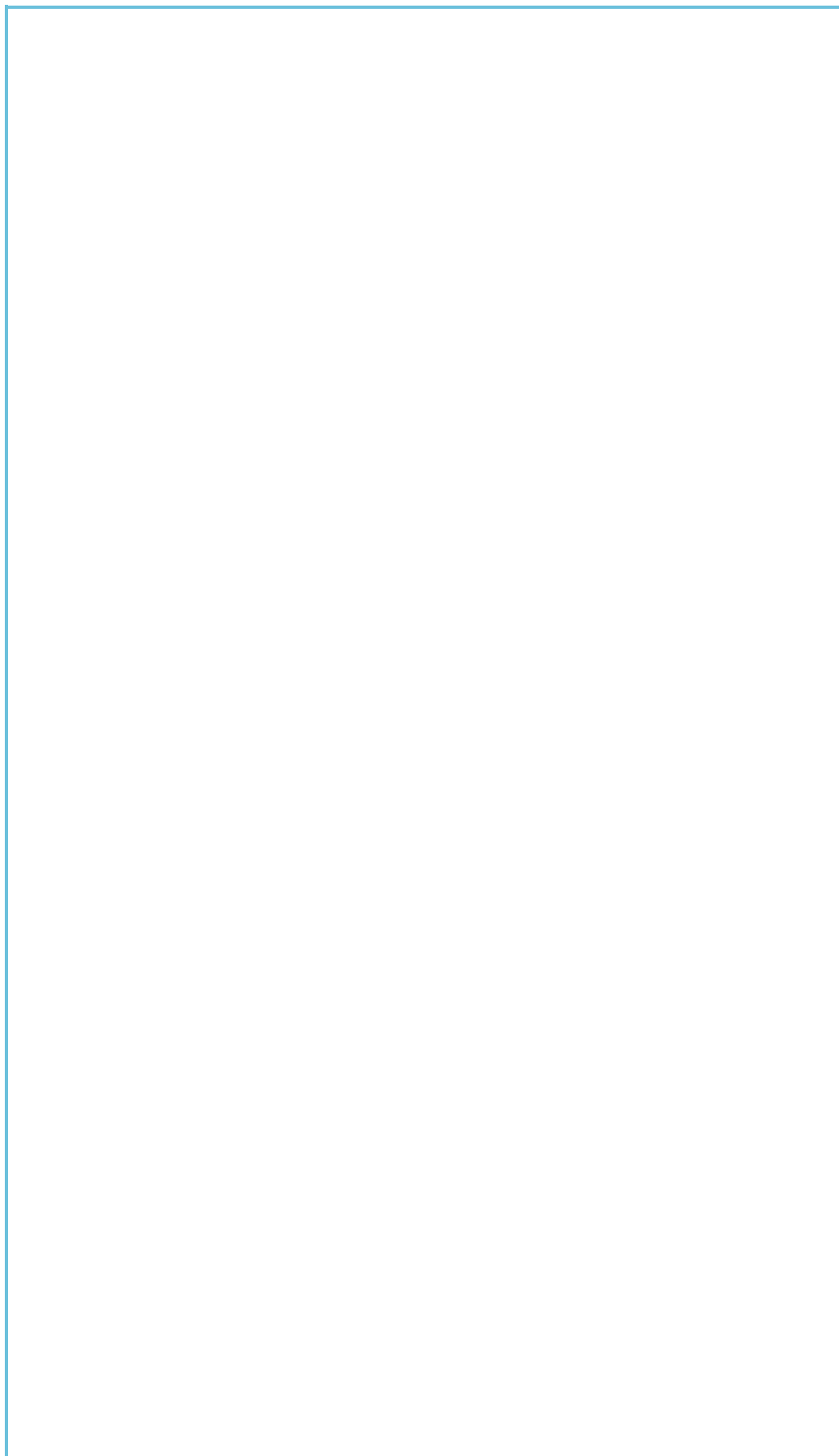
WELL-BALANCED TEAM

An outline of the skills, experience and qualifications of my key team members:



ADVISERS

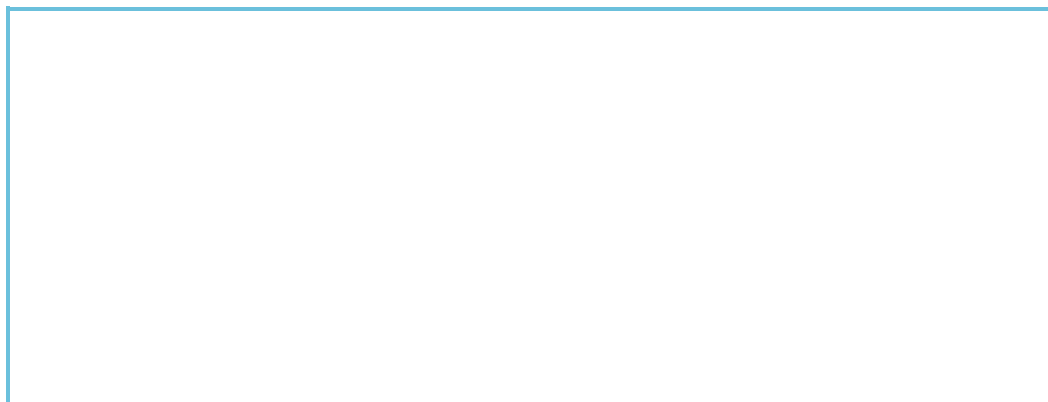
The skills my advisory team bring to the table:





BUSINESS SUPPORT NETWORKS

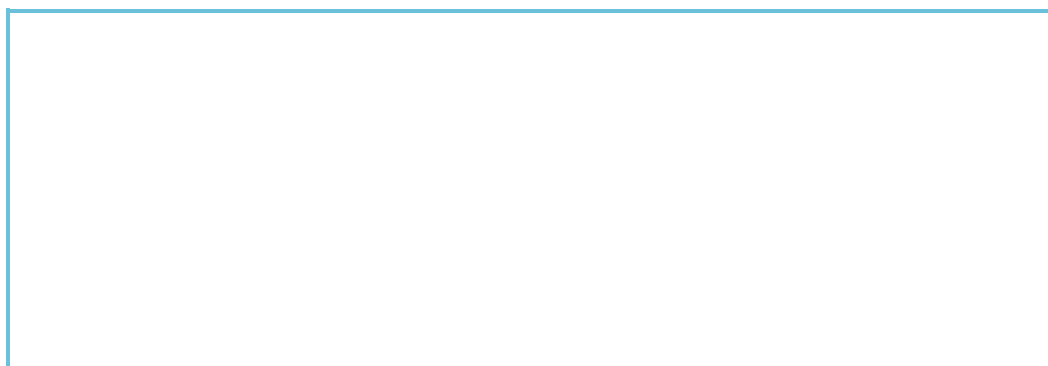
An outline of the support networks I have access to:



BUSINESS SYSTEMS

Important systems we have adopted or are developing to enable us to deliver to customers:

For example, systems for accounting, budgets, tax and compliance issues, production and order fulfilment.



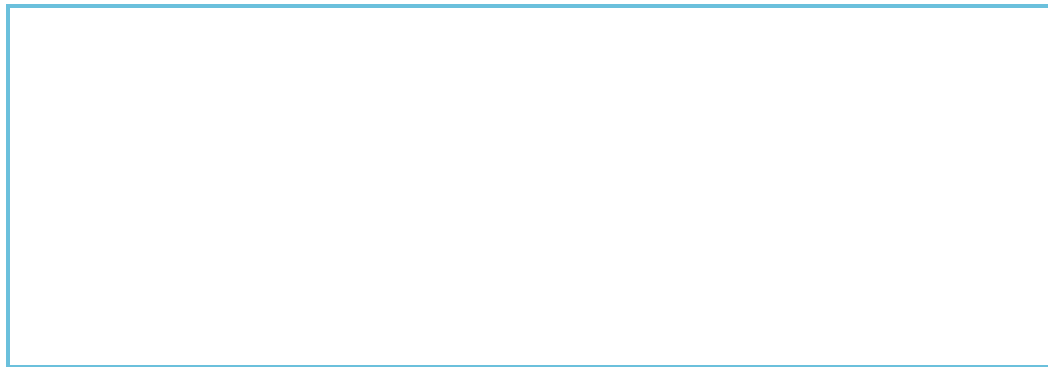
CUSTOMER SERVICE

How we plan to deliver excellence to customers:



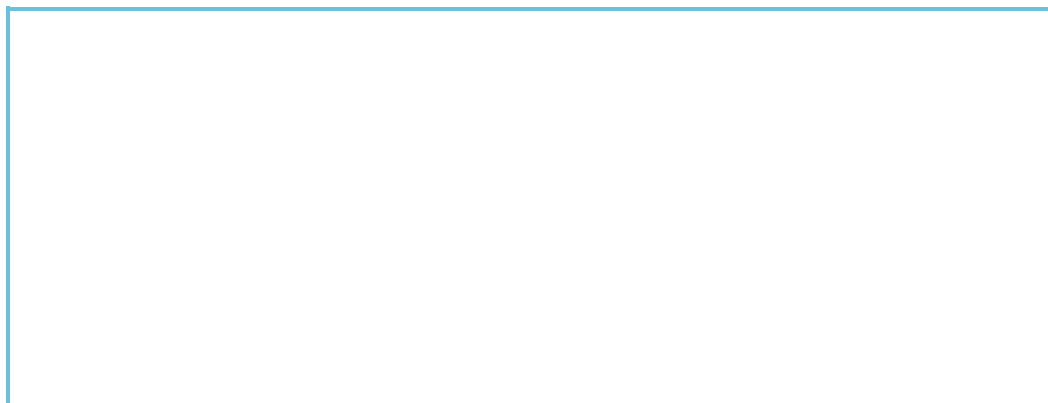
PRODUCTIVITY AND TECHNOLOGY

The productivity software and technology we use, and how it benefits the business:



TECHNOLOGY ADVANCES

Areas of innovation we are monitoring:



Chapter 5: Finance

BUSINESS FEASIBILITY

A summary of our break-even calculations and assessment of how feasible the business is:

If your business idea is simply not feasible then it's better to find this out now than to plunge ahead and lose your capital. Your time has not been wasted; the knowledge will pay off next time.

CASH FLOW FORECAST

A summary of our cash flow forecast:

Cash flow forecast attached

SUSTAINABLE CASH FLOW

How we plan to achieve predictable revenue streams in the business:

PRODUCT/SERVICE PRICING

How we have priced our products/services:

MONITORING PERFORMANCE

The Key Performance Indicators we plan to use to monitor business performance:

FINANCIAL KPIs

MARKETING KPIs

SPECIFIC KPIs THAT DRIVE OUR BUSINESS

POSITIONING STRATEGY

How we plan to position our business in the marketplace:

FUNDING YOUR BUSINESS

How we will fund the business:

Include what checks you have taken – such as a review by your accountant or financial adviser – to avoid underestimating start-up costs.

START-UP FUNDING

POST START-UP GROWTH

SUMMARY

Keep this brief while covering these three critical topics: the viability of your business; any gaps you still need to close; and the main points of your plan.

ATTACHMENTS

List the financial documents attached to your Business Plan.

