



## **Business Plan Framework**

A Business Plan helps you think through all aspects of your organisation and plan for the future. It helps you get an overview of your organisation, and is a useful tool for presenting yourself to funders and supporters.

A Business Plan may be for your whole organisation, or for a particular project or part of your organisation (when it is sometimes called a Project Plan).

The framework that follows outlines the issues to be included/considered under each of the headings in the Organisation Plan.

### **1.0) Executive summary**

This should summarise the plan. It should provide anyone reading it with a quick and clear idea of what you are planning to do. It should be no more than 1 page and include the 5 main points that you want the reader to remember. It should be written after the rest of the plan is complete.

It could include some of the following issues:

- Brief background of the organisation
- The strategic purpose of the organisation
- What the company structure will be
- What market there is

- What products/services it will provide
- The demand or need for the product/service
- The key strengths of the organisation
- The expected financial performance
- The assumptions upon which the plan is based
- Any anticipated risks and how they will be dealt with
- The track record of the organisation

## **2.0) Introduction and Mission Statement**

What is the purpose and duration of the plan?

A brief 30-40 word statement that describes what drives an organisation, what is unique about it and identifies the outcomes and benefits it provides.

## **3.0) Organisation Background**

Information that will assist the reader in understanding the rest of the Business Plan, it could include the following:

- How the organisation began
- Why it came about
- Some key events and characteristics of the organisation to date
- What is the legal status?
- Where is the organisation located?
- What does it provide to whom
- What is the scale of the operation-annual turnover, number of customers?
- How does the organisation relate to the community in which it is situated?

- Relationship/partnership with other community organisations, the local partnership etc

#### 4.0) Current Situation of the Organisation

- The record of the organisation to date
- What has it achieved?
- What are its strengths how has it been recognised and acknowledged?
- What positive links are there to other organisations?
- What are the organisation’s weaknesses?
- The development of the project from its beginnings until the time that you prepared your business plan

#### 5.0) Market Analysis/Research

- What is likely to be happening in the organisation’s environment? ( You could conduct a PEST and SWOT analysis)

**Political** – Any political factors of concern?

**Economic** – i.e. local rental costs, taxing, insurance cost increases?

**Social** – What demographic issues are there i.e. outward migration?

**Technological** – i.e. Do you have access to appropriate technology?

<b>Internal factors</b>	<b>Strengths</b>	What advantages do you have? What do you do well?
	<b>Weaknesses</b>	What do you do badly? What could you improve?
<b>External factors</b>	<b>Opportunities</b>	What opportunities or trends are you aware of?

		Are there any promises of funding/or work?
	<b>Threats</b>	What obstacles DO YOU FACE? What is your competition doing? How could their activities affect your organisation?

## 6.0) Aims & Objectives

- What are the core aims and specific objectives?
- Based upon the Market research what is the organisation's niche in the market?
- What will you be able to provide that is different and is not currently on offer from another organisation?
- Who will the service be delivered to in the future?

**Aims** are statements detailing the purpose of your organisation or project. They can be seen as the changes you want to make, through your organisation or project. Don't have more than 6 aims.

**Objectives** are the tasks needed to achieve the aims. Each aim will have several objectives. Objectives will have targets (sometimes called outputs) - realistic numbers that you expect to achieve, it is recommended that these should be SMART. This means they should be:

- Specific
- Measurable
- Achievable
- Realistic
- Timed

Examples of SMART objectives might include:

- To train a minimum of twelve volunteer counsellors by the end of December
- To develop our website so it is on-line by the end of June
- To provide 150+ appointments offering housing advice within the next 12 months.

As well as setting a realistic 'by when' date, it is also helpful to identify who is responsible for ensuring that the objective is achieved. Objectives should match up with the detailed work plans of individuals and teams within the organisation.

- What are the longer-term strategic plans for the business/service?

### **7.0) Marketing and Publicity**

- How will you advertise what you do to everyone who could use your services?
- How will you make sure no one is excluded?
- How will you target the kinds of people you most want to reach?
- How will you promote yourself to supporters, partners and potential funders?

### **8.0) Track record and resources**

- How can the organisation demonstrate that it can deliver the plan effectively?
- Key past successes?
- Key staff and their qualifications and qualities
- Rigorous and effective systems in place
- Organisational strengths?

- Records of achievement
- Current and potential partners

### **9.0) Financial Plan/ Implications**

- Revenue expenses. What business expenses will you need to have in place?
- Start up costs?
- How will the above be financed? Funding/ loans?
- What capital items will you need to purchase/do you already have? What is their value?
- What equipment will you need to purchase/ do you already have? What is the value of these items?
- How will the organisation be paid/funded?
- What is the payment/grant schedule?
- What credit control mechanisms will be in place?
- Do you have a financial forecast for the year of income and expenditure?
- How will it be managed?

### **10.0) Monitoring and evaluation processes.**

- How will you measure the success of the organisation or project?
- How will you make sure you reach the targets you have set?
- How will you collect information about the work that you are doing?
- On paper, in a database?
- Who will do this and when?
- How will this information feed into improving the project?
- Who will analyse this information and act on it to make changes?

### **11.0) Implementation Plan**

Phased and agreed actions to be taken to implement the plan, provide details about each of the above tasks: when they will be done, and who will do them. This plan can be used by the management committee and staff to monitor progress.

## **12.0) Exit Strategy**

- Who will be responsible for handling that activity?
- Is there a local Non-Governmental Organisation or agency e.g. the municipality or a community organisation to which it should be transferred?
- How will the activity be transferred?
  
- Are there performance specifications to be maintained?
- How will it be funded?
- How will it be monitored?
- What will be the role of the community in managing or monitoring?
- How will the community role be supported?
- What is the role of the local authorities?
- Do the successor organisations need any training?
- Which assets need to be retained by your organisation and which ones can be transferred to a successor?