

Your Business Plan Template

Provided by PNE, Powered by You

The PNE Business Plan Template should be used after the completion of the PNE Business Development Handbook and in conjunction with the PNE Business Plan Guidance document available at www.pne.org.

We are here to support, and if you have any questions or need to work this through with a member of the PNE team please do not hesitate to contact us, *(details at the bottom of each page)*.

It is recommended that when you have completed this template you add your own branding to make it visually more representative of your own business and yourself.

This template is available as a printout for those who wish to complete by hand as well as an Adobe PDF document.

An action plan sheet is available at the end to allow you, while working through this template, to make notes of actions you need support with or to complete.

If there are any sections of this plan that you feel aren't relevant to the business, please type not relevant – *this helps the business advisor to assess whether it was left as a gap as help needed or if it just simply is not relevant at all.*

Before you submit your business plan to whomever needs it, please get it reviewed by a business advisor for feedback. Make sure you have branded it your own and ensure the person or company you are sending this to is accurate and genuine – please do not make your business plan available online.

Business Name:	
Address:	
Telephone:	
Email:	
Website:	
Social Media:	
Date of Last Update:	

Executive Summary

An overview of the main activities of the business. Include dates when activities are scheduled to begin. *(1 paragraph is required.)*

Your Business Vision and Values:

Your Business Aims:

Your Business Goals:

(Make 3 that are SMART – Specific, Measurable, Achievable, Realistic and Timebound. For example,

- 1.
- 2.
- 3.

Briefly explain here how you arrived at this business idea and any research you have completed that shows this business is feasible and viable. *(1 paragraph is required.)*

Provide a summary of any investment *(Loans or Grants for example)* to be sought or already obtained.

Description of the Business in Detail

Explain how you decided on this business idea, the decision behind the legal status selection of your business and any collaborations, partnerships or other people you will be working with and why.

Please explain here the different products and services you are offering within the business and whom your target audience is. Provide as much detail, and if you can include images of your products. You may like to show here if you are looking to take over an established business or buy into a franchise opportunity.

Do you have or do you require any machinery / tools? *(For example, car or van, oven, tables, desks.)*
Detail what items you have and those that are required?

Detail here if your business is operating as a Social Enterprise, CIC or other form of purpose led community business. Include what % of social impact you will have and in which geographical or community area you will initially focus on.

Business Legal Liabilities and Risk

Detail here information on what the business needs to operate, include when they were obtained or when you plan to obtain these.

Licenses:

Insurances:

Specialist memberships or accreditation:

Any Intellectual Property the business has obtained or is looking to obtain such as trademarks or patents etc:

If you require premises for the business:

Have you purchased a property / unit:

Lease terms:

Have you rented a property / unit:

Terms of the lease:

Landlord information:

Breakout clauses:

Deposit and bond requirements:

What stage the business is at in obtaining the full lease:

Competition

Document here 3 businesses or individuals that you see as being in competition with you. Explain why they are competition, what they offer and do and what attracts people to them.

- 1.
- 2.
- 3.

Customers and Intention

Describe here who your customers are for the business. Think about the geography, the demographics (*age / gender etc*) of the individuals, or the types of business you are offering your product or service to.

Ideally you will add here 2 or 3 customer profiles that cover things like age, gender, location, employment status, income, family make up etc.

Detail what primary and secondary market research you have conducted and the findings from this.

If your intention is to operate a business that benefits a local community describe this here. Include information of the target community / group, why it is needed, as well as how you intend to receive income from the customers described.

Marketing and Communications

What is your unique selling point (*USP*), what makes you stand out from your competition and attract people to you as a business?

What tools and methods will you use to market your business and what are the goals for each? Detail if there are any costs or external support you require and will or are using in the business.

How will you keep your customers coming back?

How you will measure each aspect of marketing to show it works?

Information Technology Use

What technology will you use, and why?

How will this support you? Detail any training requirements you have in these areas.

Have you implemented a backup strategy for your technology assets?

If you are keeping client data, have you registered with the ICO (*Information Commissioner's Office*)? Include the date of when, and demonstrate GDPR compliance by detailing here processes you have put in place.

Financial Management

Explain your pricing strategies. (*For example, what is your daily rate and how this was calculated.*)

How many products and / or services can you offer each week, month, year? How much will it cost you for the resources you need to provide this?

If you are already trading, have you made sales yet, if not do you have pre-orders or promises in place?

Document here your plans for funding the business going forward. Is there a requirement for investment, if so for what and how much and is this in place? Is there any reason why funding could be a problem to access (*for example credit rating of owners*)?

How do you record your income and expenditure, and who are you banking with?

Information Regarding the Owner/ Managers

Detail here the business owner(s) names.

Relevant to this business sector or transferable for use within the business, what are the qualifications and experience obtained and when?

Detail here why you want to run this type of business. What is the owner(s) passion?.

Detail here any additional training and support you are looking to pursue to enhance the business offering, and when this will be undertaken.

Contact Information

Business Trading Type:

Date Business Started Trading:

Companies House Registration Number *(if Limited)*:

Business Address:

Business Telephone / Contact Number:

Business Email Address:

Business Social Media Links:

Business Website Address:

Business Advisor and Organisation Supporting You:

Owner(s) Full Name(S):

Owner(s) Month and Year of Birth:

Owner(s) Postcode:

Owner(s) Telephone Number:

Owner(s) Email Address:

Owner(s) Employment Status *(please include if you are involved in the running of any other businesses here too)*:

Owner(s) Accessibility Requirements:

Action Plan

Here you can make notes of actions you need support with to complete the business plan template.