



OPTIMAL BOOKS

BOOKKEEPING & TAX SOLUTIONS

	<p>Business Plan for <i>Company Name</i> at: <i>Date</i></p> <p>Address _____ Phone _____</p> <p>Email _____</p>
Vision	<p>This section should articulate your hopes and dreams for the business.</p> <p><i>What are you building?</i></p> <p><i>What do you see this business becoming in x years?</i></p> <p><i>How do you plan to grow the business and to what degree? For example, will you hire employees, open up branch outlets, or take the business public?</i></p>
Business Overview (or Mission)	<p>The business overview or mission should describe how you intend to achieve your vision. For example:</p> <p><i>What services will you provide?</i></p> <p><i>What is your target market—who will buy your services?</i></p> <p><i>How will your service offerings address the needs of customers, for example, what is your unique selling proposition?</i></p> <p><i>How will you provide your services? Will you offer your services online, or at a business location?</i></p>
Pricing Strategy	<p>The pricing strategy section needs to demonstrate how your business will be profitable. Summarise your projected revenue and expenses:</p> <p><i>How much will you charge for your Goods or services?</i></p> <p><i>Briefly describe how your pricing will be competitive enough to attract customers but be high enough to generate a profit after subtracting expenses.</i></p> <p>Consider breakeven analysis and pricing strategies.</p>
Advertising and Promotion	<p>This section describes how you intend to get the word out to customers about your services. For example:</p> <p><i>What are the most efficient ways to market your good or services? For example, will you market them via a business website, email, social media, or newspapers?</i></p> <p><i>Will you use sales promotional methods such as pricing discounts for new customers?</i></p> <p><i>What marketing materials will be used—business cards, flyers, or brochures?</i></p> <p><i>What about referrals?</i></p>



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Objectives	<p>This section lists your objectives and metrics for success by time frame, as well as potential questions or challenges. For example:</p> <p><i>Capture 20% of the local market share by year end</i></p> <p><i>Gain five steady customers in the first six months of operation</i></p> <p><i>Earn a net income of \$50,000 for the first fiscal year</i></p> <p>List any obstacles or concerns, for example:</p> <p><i>Winter season or poor spring weather reduces demand for landscaping services.</i></p>
Action Plans	<p>Briefly describe the action items needed to achieve your objectives, using milestone dates. For example:</p> <p><i>By "date" a fully-equipped home office will be completed.</i></p> <p><i>By "date" business licenses and insurance acquired.</i></p> <p><i>By "date" purchase of delivery van negotiated with dealer.</i></p> <p><i>By "date" launch business website with description of services and price list.</i></p> <p><i>By "date" social media marketing plan in place and potential customers connected via Facebook and LinkedIn.</i></p> <p><i>By "date" subscribed to cloud-based accounting software and setup customer invoice templates.</i></p> <p>Why People Love Xero</p> <p>Describe possible solutions for any potential obstacles:</p> <p><i>If landscaping services cannot be delivered due to bad weather, look into providing other services such as snow clearing or tree pruning.</i></p>

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