

Business plan template



If you're considering establishing or purchasing a small business, it's important that you have a business plan.

A plan will help provide you with an essential road map for your new business. It will also provide you with benchmarks against which you can measure the success of your activities as you build your business.

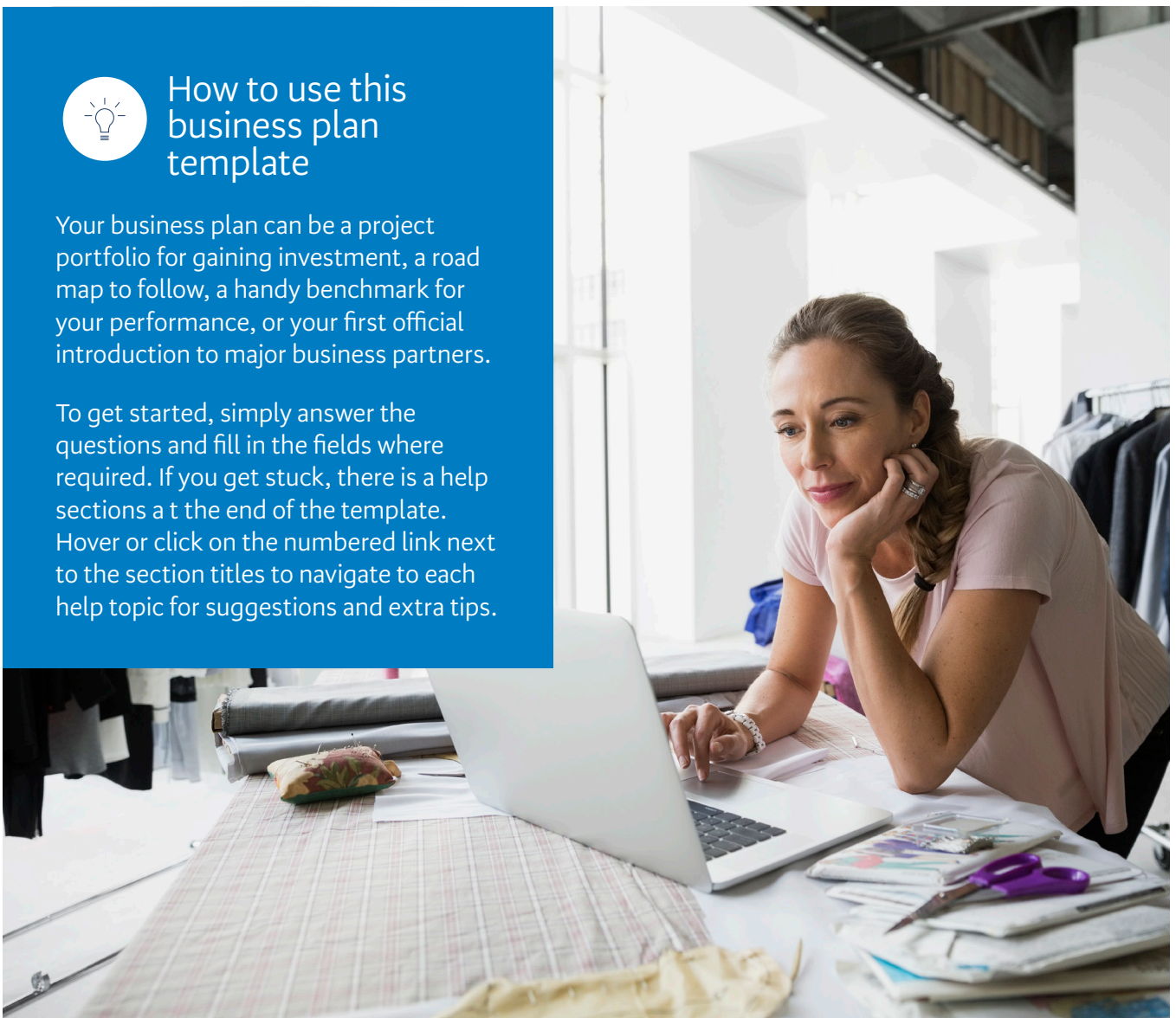
The following template will help you generate a tailored business plan that's right for your business.



How to use this business plan template

Your business plan can be a project portfolio for gaining investment, a road map to follow, a handy benchmark for your performance, or your first official introduction to major business partners.

To get started, simply answer the questions and fill in the fields where required. If you get stuck, there is a help section at the end of the template. Hover or click on the numbered link next to the section titles to navigate to each help topic for suggestions and extra tips.





1. Business profile

Business name

Business structure

Business owners

Date established

D	D	M	M	Y	Y
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Date registered

D	D	M	M	Y	Y
---	---	---	---	---	---

Business registration number

Business Address - Postal

Street address	
Suburb	
Town/City	Postcode
Country	

Business Address - Physical

Street address	
Suburb	
Town/City	Postcode
Country	

Contact details

DD
Mobile
email

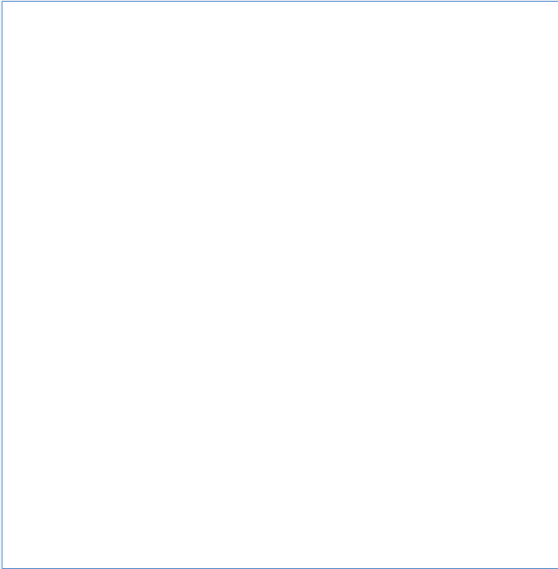
Online presence

Website
Facebook page
Twitter account
Blog

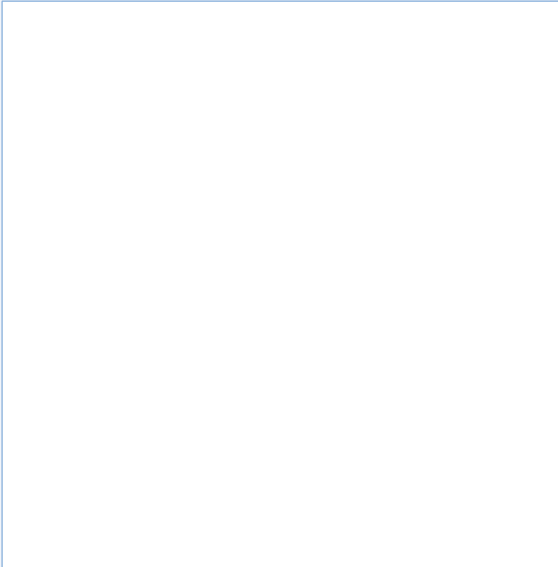
2. Executive summary

3. Background

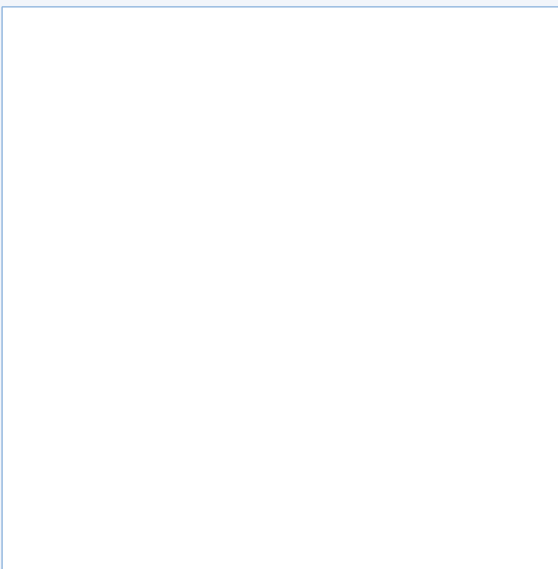
History



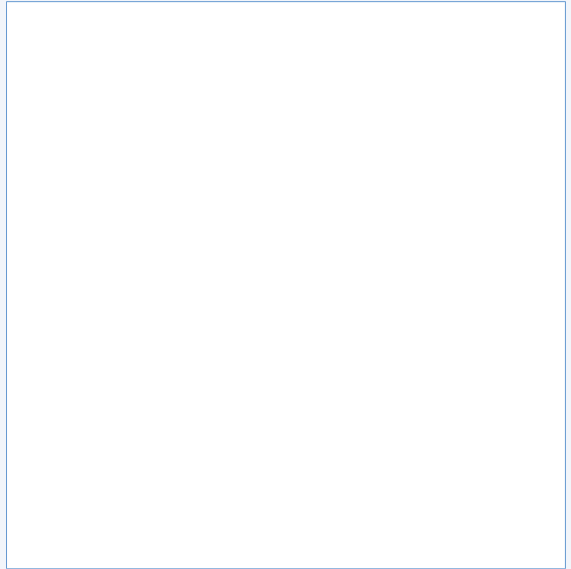
Objectives



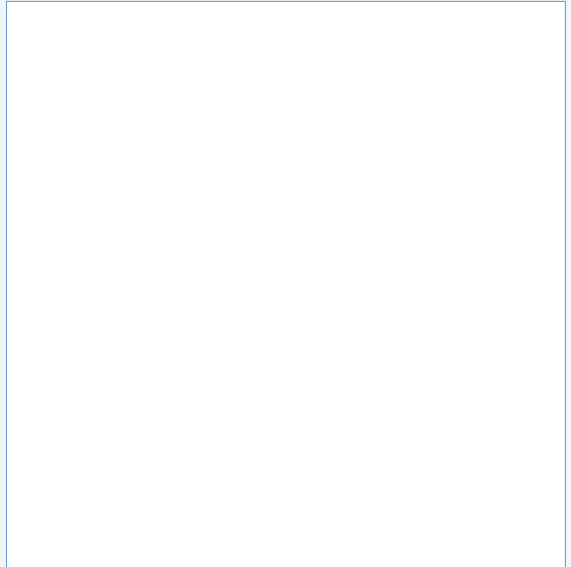
Products and services



Patents and trademarks



Location



4. Goal setting

Summary of future plans

Short term goals

Target date

Short term goals	Target date

Long term goals

Target date

Long term goals	Target date

5. Management, team and support

Management structure

Name	Position/responsibility	Phone
	Overall governance	
	Lawyer	
	Accountant	
	BNZ Small Business Specialist	

6. Key personal details

Name

Role

Experience

Qualifications

Specialist area

Name

Role

Experience

Qualifications

Specialist area

Name

Role

Experience

Qualifications

Specialist area

Vacant positions

Business support networks

Organisational structure

Name

Position/responsibility

Reports to

Name	Position/responsibility	Reports to

Recruitment policies

7. Market research

Primary research undertaken so far

Secondary research undertaken so far

Future research required

8. Competitor research

Competitor 1

Their strengths

Their weaknesses

How we will compete with them

Competitor 2

Their strengths

Their weaknesses

How we will compete with them

Competitor 3

Their strengths

Their weaknesses

How we will compete with them

Competitor 4

Their strengths

Their weaknesses

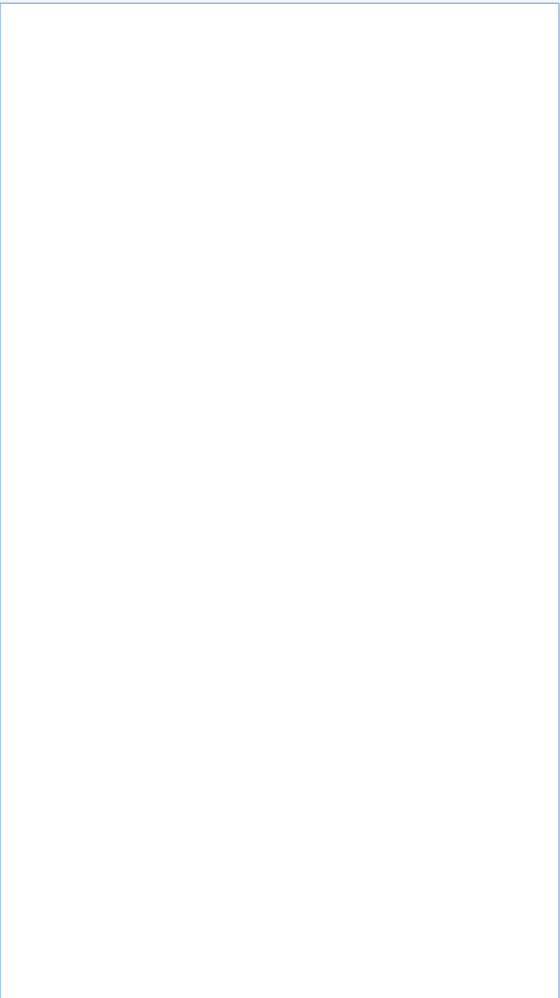
How we will compete with them

9. SWOT analysis

Strengths

Weaknesses

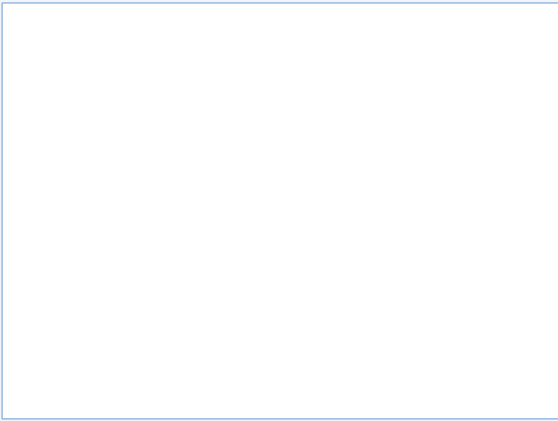
Opportunities

A large, empty rectangular box with a thin blue border, intended for listing opportunities.A second large, empty rectangular box with a thin blue border, intended for listing opportunities.

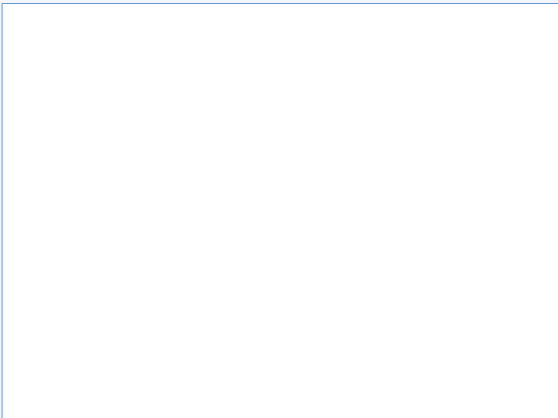
Threats

A large, empty rectangular box with a thin blue border, intended for listing threats.A second large, empty rectangular box with a thin blue border, intended for listing threats.

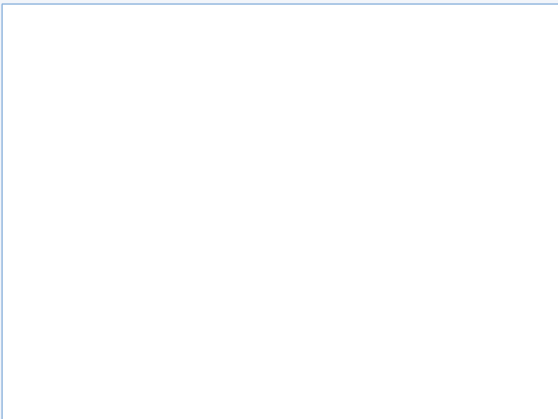
10. Market overview



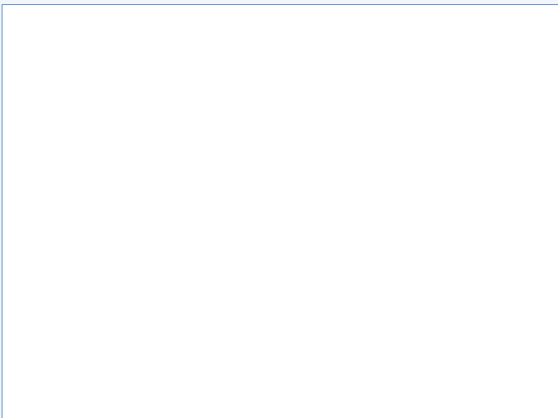
Market description



Market size



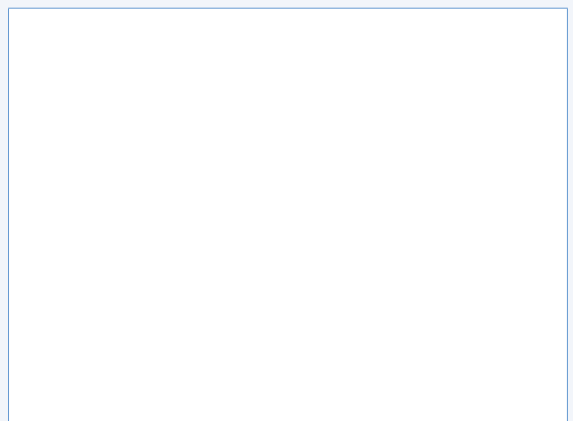
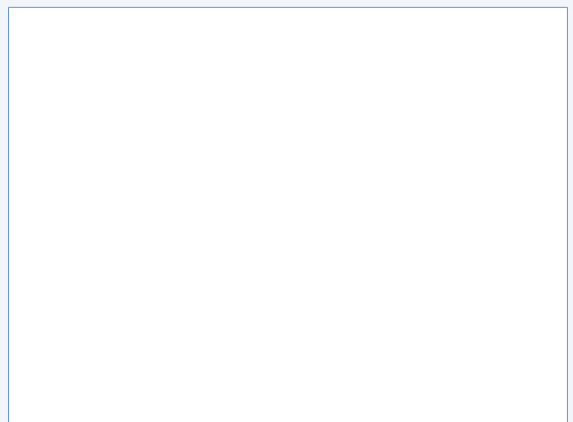
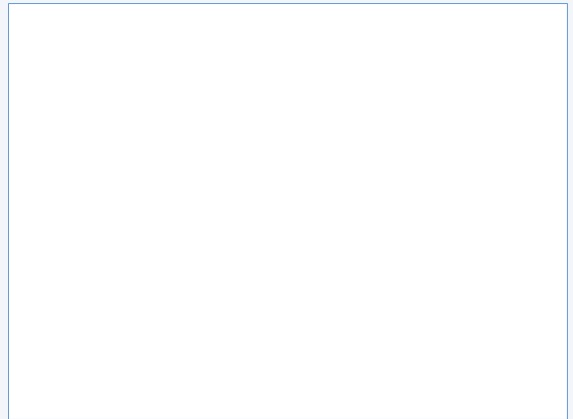
Market structure



Market opportunities



Future markets



11. Target market

Target market description

How we will meet the target market's needs

Factors influencing purchasing habits

12. Marketing

Marketing strategy

Marketing budget

\$

13. Financial plan

Start-up costs summary

Date you will break even

D	D	M	M	Y	Y
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Sources of funding

Profit and loss forecast summary

	1 year	2 years	3 years
Overall sales forecast	\$	\$	\$
Overall costs forecast	\$	\$	\$
Overall profit/loss forecast	\$	\$	\$

Cash flow forecast summary

Balance sheet forecast summary

14. Compliance

Legal and regulatory considerations

I have carried out the following:

- Confirmed my legal structure
(Sole trader, Partnership, Company)
- Registered for GST
- Applied for a tax number
- Arranged for insurance cover
- Applied for patents or trademarks
- Applied for local licences and permits

Applied for verification with the following standards bodies and regulators specific to my industry:

Insurance

15. Operational factors

Business premises

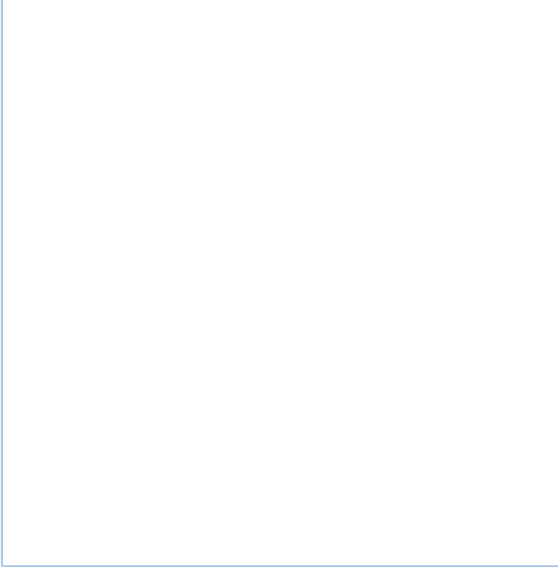
Equipment

Requirements

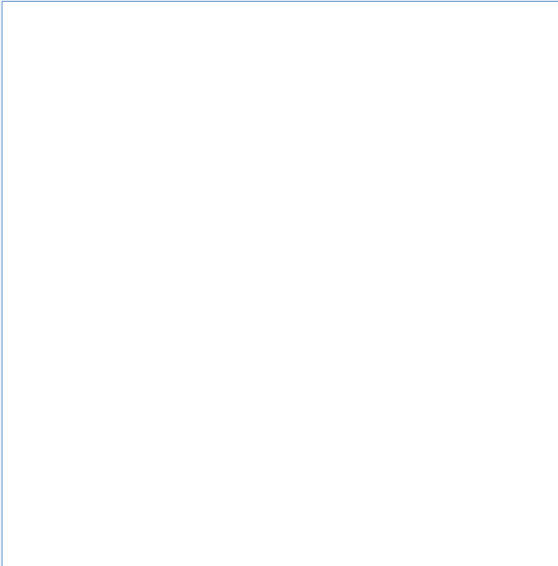
Solutions

I.T.

Requirements

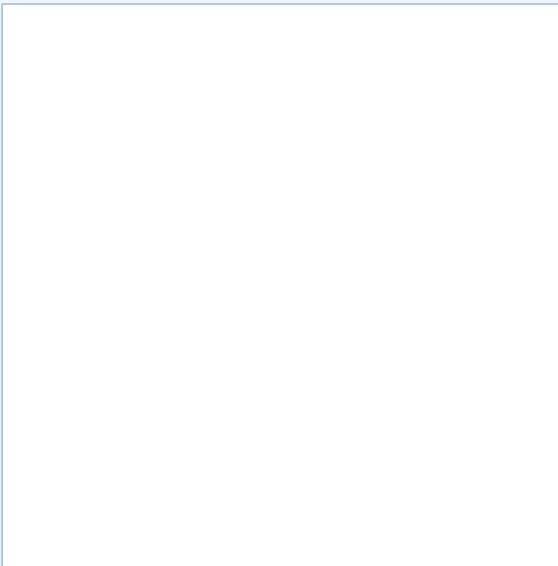


Solutions

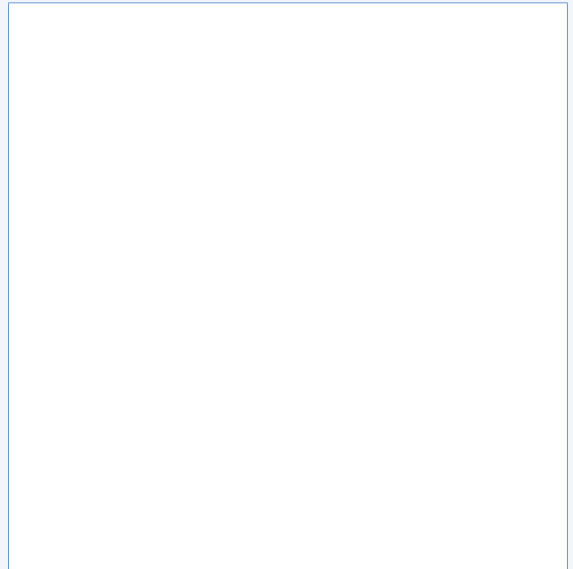


Orders

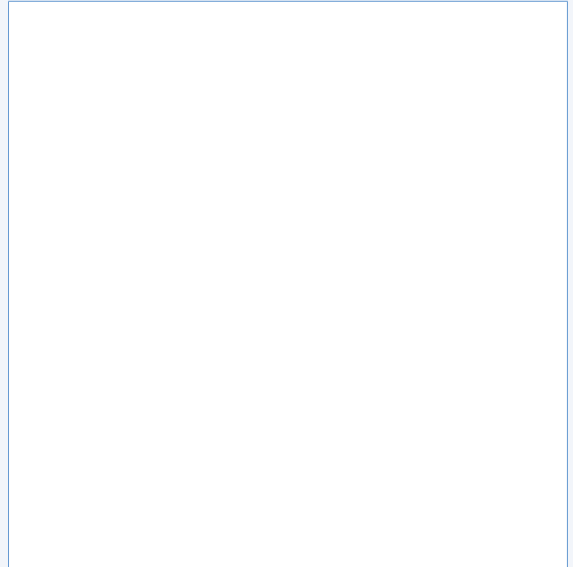
Process of fulfilling orders



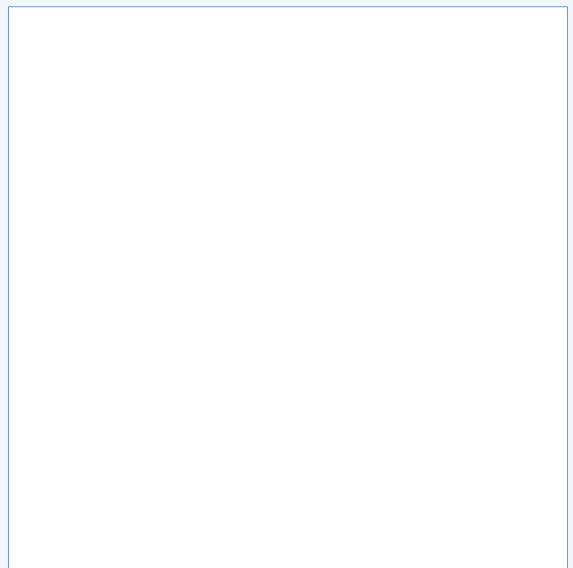
Process for handling returned orders



Process for data gathering



Outline suppliers - who they are and what they supply

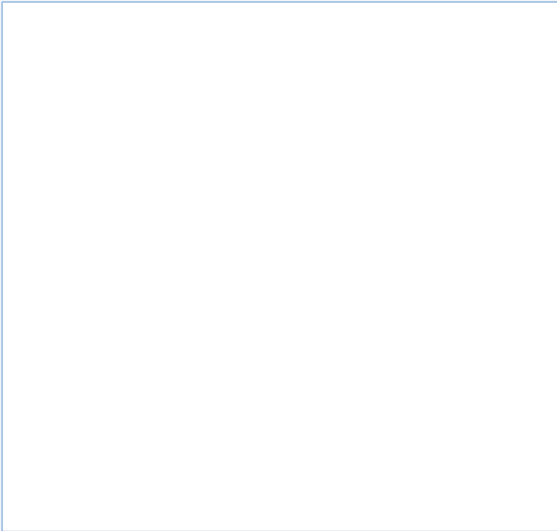


16. Exit planning

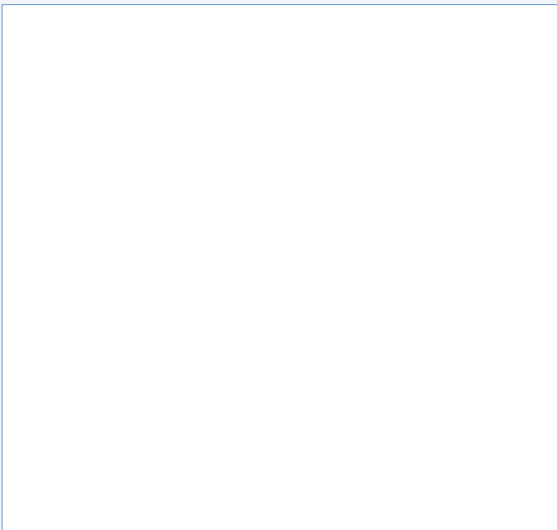
Who will buy the business – family, employees, outside buyer?



Processes and documentation required



Timeline – define goals and plan milestones



Delegate – who will be taking control



Professional advisors

