|  |  |
| --- | --- |
| Business Name |  |
| Applicant Name/s |  |
| Address |  |
| Phone |  |
| Email |  |

Business Plan Template

Contents

[1.0 Executive Summary 4](#_Toc412014930)

[1.1 Mission Statement 4](#_Toc412014931)

[1.2 Business Description 4](#_Toc412014932)

[1.3 Product/Service Features 4](#_Toc412014933)

[1.4 Location 4](#_Toc412014934)

[1.5 Market Analysis 4](#_Toc412014935)

[1.6 Market Strategy 4](#_Toc412014936)

[1.7 Key Financial Objectives 4](#_Toc412014937)

[1.8 Business Structure 5](#_Toc412014938)

[1.9 Human Resources 5](#_Toc412014939)

[1.10 Key Objectives 5](#_Toc412014940)

[1.11 SWOT Analysis 5](#_Toc412014941)

[2.0 Business Eligibility Criteria - NEIS 6](#_Toc412014942)

[3.0 Legal Requirements 7](#_Toc412014943)

[3.1 Business Registration 7](#_Toc412014944)

[3.2 Business Structure 7](#_Toc412014945)

[3.3 Licences and Permits 7](#_Toc412014946)

[3.4 Insurance 7](#_Toc412014947)

[3.5 Record Keeping Systems 8](#_Toc412014948)

[4.0 Marketing Plan 9](#_Toc412014949)

[4.1 Target Market (Customer Analysis) 9](#_Toc412014950)

[4.2 Competitor Analysis 9](#_Toc412014951)

[4.3 Product/Service 9](#_Toc412014952)

[4.4 Product/Service Production 9](#_Toc412014953)

[4.5 Marketing Strategy 9](#_Toc412014954)

[4.6 Selling and Customer Service Procedures 10](#_Toc412014955)

[4.7 Marketing Action Plan 10](#_Toc412014956)

[5.0 Business Operations 11](#_Toc412014957)

[5.1 Production Process 11](#_Toc412014958)

[5.2 Suppliers 11](#_Toc412014959)

[5.3 Plant and Equipment 11](#_Toc412014960)

[5.4 Inventory 11](#_Toc412014961)

[5.5 Technology (Software) 11](#_Toc412014962)

[5.6 Trading Hours 11](#_Toc412014963)

[5.7 Communication Channels 11](#_Toc412014964)

[5.8 Payment Types 12](#_Toc412014965)

[5.9 Credit Policy 12](#_Toc412014966)

[5.10 Warranties and Refunds 12](#_Toc412014967)

[5.11 Quality Control 12](#_Toc412014968)

[5.12 Occupational Health and Safety 12](#_Toc412014969)

[5.13 Risk Assessment and Management Plan 12](#_Toc412014970)

[6.0 Financial Plan 13](#_Toc412014971)

[6.1 Key Objectives and Financial Review 13](#_Toc412014972)

[6.2 Income Projection (Profit and Loss) 13](#_Toc412014973)

[6.3 Cash Flow 13](#_Toc412014974)

[6.4 Break-Even Analysis 13](#_Toc412014975)

[7.0 Human Resources 14](#_Toc412014976)

[7.1 Management and Key Personnel 14](#_Toc412014977)

[7.2 Future Staffing 14](#_Toc412014978)

[7.3 Professional Development 14](#_Toc412014979)

[8.0 Supporting Documentation 15](#_Toc412014980)

[9.0 Business Action Plan 16](#_Toc412014981)

|  |
| --- |
| Executive Summary |
| Mission Statement |
| A mission statement captures in a few sentences the essence of your business’ goals and the philosophies underlying them. Your mission statement provides customers, employees, suppliers and the community with an introduction to your business. |
| 1.2 Business Description |
| The overview should provide the reader with a clear summary of what your business will do. It should briefly answer the following questions:* What does your business do?
* What industry is it in – e.g. food retail, online clothing retail, consumer services?
* What sets your business apart from your competitors, e.g. different location, lower price, better service?

Outline the products or services, who will buy them, where you feel the business will be in two to five years, and how this will be achieved. |
| 1.3 Product/Service Features |
| What are the main benefits of your product or service? Describe:* What are you selling?
* How your product or service will benefit the customer?
* The demand for your products and services – will they create a steady cash flow?
* What makes your product or service different or unique?
 |
| 1.4 Location |
| Your choice of location can make a difference to the success of your business. If your business depends on personal contact with your customers, your premises should be easy to reach and provide a sense of security. If you’re relying on passing trade, you should estimate pedestrian traffic around your chosen location and design your opening hours to cater to their needs. If you will be an online business only, provide details on the platform/s you will be using. Consider:* What kind of space will you need?
* Is it easily accessible?
* Can you secure this location on an ongoing basis – e.g. market space?
 |
| 1.5 Market Analysis |
| Marketing plays a vital role in successful business ventures. How well you market your business, along with a few other considerations, will ultimately determine your degree of success. Key information includes:* Briefly outline what market the product or service is going to be aimed at and why?
* Are these markets growing, remaining constant or declining?
* Are your target markets large enough to support your business?
* How will you attract, hold and increase your market share?
* What is your pricing strategy?
* What research is there to support your business expectations?
 |
| 1.6 Market Strategy |
| It is essential to show that there is a sound customer base for the business:* How have you done your customer and market research? Include where and how you got your information from.
* What is your unique selling proposition (USP)?
* How will you market and promote your business? Why have you chosen these ways to market your business?
 |
| 1.7 Key Financial Objectives |
| Effective financial management requires you to plan a sound, realistic budget for your business. The start-up budget for a new business will include one-off costs like official registration, major equipment, rental and utility bond payments. Your operating budget then estimates how much it will cost to keep the business open.Summarise the key information contained in the financial plan:* What funds will be required to get your business started, and how will you access these?
* When will you break even?
* What financial data have you based your estimates on? Is there comparable industry data to back them up?

Table One: Financial Summary

|  |  |  |
| --- | --- | --- |
| Detail | Year One | Year Two |
| Sales |  |  |
| Cost of Goods Sold *(CoGS)* |  |  |
| Gross Profit *(= Sales – CoGS)* |  |  |
| Expenses |  |  |
| Net Profit *(= Gross Profit – Expenses)* |  |  |
| Cashflow In |  |  |
| Cashflow Out |  |  |
| Balance *(= Cashflow In – Cashflow Out)* |  |  |
| Sales Break Even |  |  |

 |
| 1.8 Business Structure |
| When choosing your ownership structure, it’s important to weigh up the risks and costs of the available options. Provide a clear description of the ownership structure and why you’ve chosen it – e.g. sole trader, partnership, company.  |
| 1.9 Human Resources |
| People are the chief asset in any business. Your experience and expertise, together with that of your team, are the key value adders in your business. Provide the following information about yourself (and your team if applicable):* What specialised skills and expertise are you bringing to the business?
* What other relevant experience do you have?
* Do you have the required qualifications/permits/licences to operate the business?
* What other staff are required - how much will they be employed/paid?
 |
| 1.10 Key Objectives |
| Listing your key objectives gives the reader an insight into where you’re taking your business and what you’re measuring your success against. Make sure your objectives can be proven and measured.Your key objectives should be SMART – **S**pecific, **M**easurable, **A**chievable, **R**ealistic, **T**imely.Your key objectives should describe what you want to achieve in each functional business area. For example:* Financial targets – to achieve a 5% increase in net profit over the next 6 months.
* Sales targets – to sell 100 units per week for the next 6 months.
* Customer satisfaction – to maintain and expand your reputation for high quality service and sales by implementing a loyalty/referral program.
 |
| 1.11 SWOT Analysis |
| Outline the ‘SWOT’ analysis of your business (strengths, weaknesses, opportunities and threats). * Strengths – are the things that you do best and that give you an advantage over your competition.
* Weaknesses – are areas of the business that need to be acted on.
* Opportunities – show the marketplace areas that can be built on.
* Threats – are issues that could affect the success/viability of the business.

Table Two: SWOT Summary

|  |  |
| --- | --- |
| Strengths | Weaknesses |
|  |  |
| Opportunities | Threats |
|  |  |

 |

|  |
| --- |
| Business Eligibility Criteria - NEIS |
| The business is not operating on a commercial basis and has not operated on a commercial basis in the past: |
| (Business Name) is a completely new business registered for the first time on (insert date).(The business) will (insert nature of business e.g. manufacture bamboo surfboards and sell them to retail outlets). Work with customers has been limited to market testing and details are included in the marketing section of the business plan.” |
| The business will be independent: |
| (Business Name) is independent and not linked with any other business by any contracts which restrict or control the operations. The business has customers and will not enter any exclusive arrangements with customers or suppliers. The business owner will maintain controlling interest of the business for the duration of NEIS Assistance |
| The business will be reputable: |
| (Business Name) will not operate in any way that could bring the NEIS Program, and the funding Department, into disrepute and will withstand public scrutiny. Specifically, (the Business) will not use any product designs that include sexual, violent, racial, and religious or drug related themes. (Business Name) will avoid situations where the products/services could be used in a gambling context – for example, as a prize in a raffle or club promotion. |
| The business will be lawful: |
| (Business Name) will obey all applicable State and Federal laws that apply to it, including Australian Consumer Law. |
| The business is commercially viable: |
| (Business Name) is forecast to present a new profit of $\*\*\* in Year One.Insurance:(Business Name) will secure and maintain insurance appropriate to the business for the duration of NEIS Assistance. |
| *The business will be established, located and operated solely within Australia:* |
| (Business Name) is registered in (insert State) and all management and control will remain in Australia. *Overseas travel:*(*if applicable*) With the exception of marketing/buying trips to (insert locations) as detailed in the BP, all operations will be conducted in Australia. (Business Name) will supply a complete itinerary and appropriate travel insurance evidence prior to departure. |

|  |
| --- |
| Legal Requirements |
| Business Registration |
| Table Three: Business Registration Particulars

|  |  |  |
| --- | --- | --- |
| Detail | Particulars | Date of Registration |
| Business Name |  |  |
| ABN/ACN |  |  |
| GST |  |  |
| TFN (if required) |  |  |
| Domain Name |  |  |

 |
| 3.2 Business Structure |
| Provide a clear description of the ownership structure and why you’ve chosen it – e.g. sole trader, partnership, company. What legal implications and risks are associated with this ownership structure? What strategies are in place to manage identified risks? |
| 3.3 Licences and Permits |
| It is important to check what licences, permits and registrations are required to operate your business legally. The type of business, its structure and location, and staffing will determine the types of licences and permits required.Provide detailed information on licences, permits and memberships required for your business. Key considerations include:* Local, State and Federal regulatory requirements
* Membership with recognised Associations
* Trade qualifications
* Working with Children Checks/Police Checks

Table Four: Licence/Permit Particulars (as applicable)

|  |  |  |  |
| --- | --- | --- | --- |
|  | Detail | Particulars | Effective Dates |
| Federal | Superannuation |  |  |
| Workers Compensation |  |  |
| Trade Marks and Patents |  |  |
| Environmental Requirements |  |  |
| State | Workplace Health and Safety |  |  |
| Contractor Licence |  |  |
| Working with Children Check |  |  |
| Police Check |  |  |
| Environmental Requirements |  |  |
| Local | Town Planning |  |  |
| Health Certificate |  |  |
| Building Approval |  |  |
| Licence to Operate |  |  |
| Food Handling |  |  |
| Signage |  |  |
| Industry | Trade Qualification/Registration |  |  |
| Association Membership |  |  |
| Codes of Practice |  |  |

 |
| 3.4 Insurance |
| Insurance can be considered from two perspectives – as a legal requirement and to manage risks. Identify the types of insurances required for your business – e.g. public liability, product liability, professional indemnity.Table Five: Insurance Particulars (as applicable)

|  |  |  |
| --- | --- | --- |
| Type | Policy Details | Effective Dates |
| Public Liability  |  |  |
| Product Liability |  |  |
| Professional Indemnity |  |  |
| Property/Contents Insurance |  |  |

 |
| 3.5 Record Keeping Systems |
| Keeping accurate and up-to-date records is crucial to running a business. Records help you to monitor the business and comply with legal requirements.Identify the types of records required for your business, how you will store this information, and the time that the records must be held. Include:* Company records
* Financial records
* Legal records
* Employment records
* Operational records
 |
| Marketing Plan |
| Target Market (Customer Analysis) |
| Identify your target market/s and describe your customers. It is essential to show that there is a sound customer base for the business. Explain how you have carried out your customer and market research, including information sources. This should include the unique selling proposition you expect your customers to respond to. Some things to consider include:* How old are your customers?
* Are they male, female or both?
* Where do they live?
* What do they earn?
* How much of their income is disposable?
 |
| Competitor Analysis |
| Knowing about your competition can be as important as knowing your product or service. Outline your direct and indirect competitors, and how you’ll position your business against them. For example:* Who are your five nearest direct competitors?
* Who are your indirect competitors (these are businesses which might not produce the same product or service, but could reduce your market share with an alternative offering)?
* How are their businesses developing? Are they steady, increasing, decreasing?
* What have you learned from their operations? From their advertising?
* What are their strengths and weaknesses?
* How do you compare on pricing, product, promotion, distribution?
 |
| Product/Service |
| Define the product or service your business will offer and how it will be presented to appeal to your customers. Discuss:* Branding.
* Packaging (where applicable).
* Ongoing product or service development.

What are the features and benefits of your product or service and how are they going to appeal to your target market. Consider:* What is it?
* How much does it cost? And how much are you going to charge for it?
* How does it help your customer?
* Is it a necessity or a discretionary purchase?
* How much of it are people likely to buy and how frequently will they make a purchase?
* Is there potential to grow the market by developing the product or service?
 |
| Product/Service Production |
| Describe how your products or services are being produced and costed:* Are they being manufactured or bought in? Break down service charges and import costs.
* Why are the products or services being produced and costed this way?

Include information about key suppliers, and what arrangements are in place.Your pricing strategy is another marketing technique you can use to give yourself a competitive edge. Get a feel for the prices your competitors are charging. Determine whether your prices are in line with competitors in your area and with industry averages. Some pricing strategies are:* Parity pricing – offering a similar price to your competitor.
* Pricing below competition.
* Pricing above competition.
 |
| Marketing Strategy |
| Your marketing strategy activities should focus on keeping customers, attracting new customers and selling more products/services. Your strategy should consider the “ Five P’s of Marketing”:* Product – what you are selling, including features, advantages and benefits.
* Price – the pricing strategy and how it will affect your customers.
* Promotion – advertising, sales tactics, promotions and direct marketing.
* Place – where your products are seen, made, sold or distributed.
* People – customer service levels, effective communication and staff training.
 |
| Selling and Customer Service Procedures |
| Customer service is about building relationships that are positive and helpful. It is not just about responding to customer inquiries and making sales, but also dealing with complaints, resolving problems, and fulfilling customer service warranty obligations. Include the following policies/procedures:* Customer service – how will you engage with your customer from initial contact to sale completion.
* After-sales service – how will you engage with your customer after you’ve made the sale.
* Customer management records – how will you maintain your customer database/records. Consider privacy requirements.
* Refund/Replacement policy – consider requirements under Australian Consumer Law.
* Complaints – aim for a quick resolution that is fair, efficient and courteous.
 |
| Marketing Action Plan |
| Table Six: Marketing Action Plan

|  |  |  |
| --- | --- | --- |
| Activity | Task | Due Date |
| Develop Marketing Collateral | Business Cards – design and printing  |  |
| Brochures – design and printing  |  |
| Signage – car/premises etc. |  |
| Website/Facebook – content development |  |
| Finalise portfolio/product samples |  |
| Advertise the Business | E.g. Online advertising, print media, networking, trade shows etc |  |
|  |  |
| Customer Retention Strategies | E.g. Establish customer loyalty program, discounts etc. |  |
|  |  |

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| --- |
| Business Operations |
| Production Process |
| Detail the process involved in producing your products or services. This process will vary depending on your business. Cover any manufacturing processes, the people involved, any third parties involved, and details on how you deliver the product/service to your customers. |

|  |
| --- |
| Suppliers |

|  |
| --- |
| List your main suppliers and detail what they supply to your business. Also explain how you will maintain a good relationship with them. |

|  |
| --- |
| Plant and Equipment |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| List your current plant and equipment – this can include vehicles, computer equipment, phones etc. For each item include a description of the plant or equipment (make and model if applicable), purchase date and purchase price. Include equipment to be purchased on the second table with an expected purchase date.Table Seven: Existing Plant and Equipment

|  |  |  |
| --- | --- | --- |
| Item | Purchase Date | Purchase Value  |
|  |  |  |
|  |  |  |

Table Eight: Proposed Plant and Equipment

|  |  |  |
| --- | --- | --- |
| Item | Purchase Date | Purchase Value  |
|  |  |  |
|  |  |  |

 |

|  |
| --- |
| Inventory |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| List your current inventory items. For each item include:* A brief description of the item.
* Unit price.
* Quantity in stock.
* Total cost or value of the inventory item

(If you have a substantial inventory, you may prefer to summarise the information in the table below attach a full inventory list as an appendix.)Table Nine: Inventory

|  |  |  |  |
| --- | --- | --- | --- |
| Item | Unit Price | Quantity | Total Value |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

 |

|  |
| --- |
| Technology (Software) |

|  |
| --- |
| List the technology you need to run your business – e.g. website, point of sale software or accounting package. For each technology solution, detail the main purpose, whether they will be off-the-shelf or purpose built and the estimated cost of each. |

|  |
| --- |
| Trading Hours |

|  |
| --- |
| List your normal trading hours. Detail your expected peak trading times and which times you expect to be more profitable. Also include how this will change over different seasons and how your trading hours will accommodate these changes. |

|  |
| --- |
| Communication Channels |

|  |
| --- |
| Explain how your customers can get in contact with you. These channels can include: telephone, post box, shopfront, email, internet blog or social media channel. |

|  |
| --- |
| Payment Types |

|  |
| --- |
| List which payment types you will accept – e.g. cash, credit, Paypal etc. |

|  |
| --- |
| Credit Policy |

|  |
| --- |
| Detail the terms of your credit policy for customers/suppliers. Include the length of your credit period, and your collection strategies/procedures. Also detail what credit your business will receive and the terms that apply. |

|  |
| --- |
| Warranties and Refunds |

|  |
| --- |
| If you manufacture certain goods, detail your warranty terms and your refund/exchange for these goods. Refer to your Refund/Replacement policy. |

|  |
| --- |
| Quality Control |

|  |
| --- |
| Describe your quality control process. Detail any checks or balances you have in place to ensure the product or service you offer in produced to the same standard of quality. Also list the steps you will take to meet product safety standards (if applicable). |

|  |
| --- |
| Occupational Health and Safety |

|  |
| --- |
| As a business owner you have a responsibility to ensure your business activities do not create health and safety issued for employees, customers or the public. Describe how your business will meet WHS legislation with consideration to:* A safe premise/s.
* Safe machinery and materials.
* Safe systems of work.
* Training and supervision for staff – if applicable.
* Suitable working environments and facilities.
 |

|  |
| --- |
| Risk Assessment and Management Plan |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Understanding potential risks to your business and finding way to minimise their impacts, will help your business recover quickly if an incident occurs. Your risk management plan should detail your strategy for details with risks specific to your business.Table Ten: Risk Matrix

|  |  |  |
| --- | --- | --- |
|  |  | Impact to the Business |
|  |  | Insignificant | Minor | Moderate | Major | Catastrophic |
| Likelihood | Almost certain |  |  |  |  |  |
| Likely |  |  |  |  |  |
| Moderate |  |  |  |  |  |
| Unlikely |  |  |  |  |  |
| Rare |  |  |  |  |  |

Table Ten: Risk Management Plan

|  |  |
| --- | --- |
| Risk | Mitigation Strategy  |
|  |  |
|  |  |

 |

|  |
| --- |
| Financial Plan |
| Key Objectives and Financial Review |
| Getting your financials straight is a crucial step in starting or maintaining the operations and profitability of your business. List the key objectives that are essential for your business to achieve. Explain the basic financial needs of the business, starting with the initial capital, your expected income and your expected cash needs.Define your short and long term financial goals. Specify the time period that you expect to achieve these goals. Your goals should be as realistic as possible and take into account any loans you have taken to finance the business. For example:* Sales and Marketing – To achieve sales in the first quarter of $\*\*\*.
* Finance – To pay down existing loans by 50% within the first year of operation.
 |
| Income Projection (Profit and Loss) |
| The income projection statement is valuable as both a planning tool and a key management tool to help control business operations. It enables you to develop a preview of the amount of income generated each month and for the business year, based on reasonable predictions of monthly sales, costs and expenses.Table Twelve: Profit and Loss Summary

|  |  |  |
| --- | --- | --- |
| Detail | Year One | Year Two |
| Sales |  |  |
| Cost of Goods Sold *(CoGS)* |  |  |
| Gross Profit *(= Sales – CoGS)* |  |  |
| Expenses |  |  |
| Net Profit *(= Gross Profit – Expenses)* |  |  |

 |
| Cash Flow |
| A cash flow statement will reflect how much money is required to set up and start the business, and is critical to getting future finance. It will show how much cash is available after all the bills have been paid. You need to explain where the money will be coming from.Table Thirteen: Cash Flow Summary

|  |  |  |
| --- | --- | --- |
| Detail | Year One | Year Two |
| Cashflow In |  |  |
| Cashflow Out |  |  |
| Balance *(= Cashflow In – Cashflow Out)* |  |  |

 |
| Break-Even Analysis |
| Your break-even point is the amount of money you need to make from sales to cover all your expenses. To calculate your break-even sales use information from Table 8 in the Financial Plan.Break-Even Sales = (Total Expenses (in $) / Gross Profit %) + Total Other Expenses (in $)Example: * Total Expenses = $4,500
* Gross Profit % = 15%
* Total Other Expenses = $3,500
* Break-Even Sales = ($4,500/15%) + $3,500. Therefore this business needs to sell $33,500 per year to break even.

Table Fourteen: Break-Even Summary

|  |  |  |
| --- | --- | --- |
| Detail | Year One | Year Two |
| Total Expenses $ |  |  |
| Gross Profit % |  |  |
| Total Other Expenses $ |  |  |
| Break-Even Sales *(Total Expenses/Gross Profit %) + Total Other Expenses)* |  |  |

 |

|  |
| --- |
| Human Resources |
| Management and Key Personnel |
| Starting and running a business requires specific skills, so it’s essential to identify the skills you already have and the ones you may need to improve or learn. Key considerations include:* Defining your organisational structure.
* Identifying your skills and experience – and that of any staff.
* Developing a job description (outline of duties) and job specification (education, experience and personal qualities required) for key personnel.
* Include details of employment conditions (awards or workplace agreements) under which staff would be employed.
* Include details of business advisors or other external contacts (e.g. Business Mentor, Accountant, Solicitor, Banker, Insurance Company etc.)
 |
| Future Staffing |
| Employees can be your most valuable asset and in many cases they will also be your greatest cost, so it’s important to hire the right people. Use the table below to identify your future staffing requirements, including when the position will be required and the cost to your business. Table Fifteen: Future Staffing Requirements

|  |  |  |
| --- | --- | --- |
| Position | When Required | Cost to Business |
|  |  |  |
|  |  |  |
|  |  |  |

 |
| Professional Development |
| Undertaking ongoing learning and professional development increases job satisfaction and can help to retain staff. Identify training and networking activities to be undertaken in the first two years of business operation (e.g. courses, networking events, free government seminars, industry events, business expos, NEIS workshops etc.). |

|  |
| --- |
| Supporting Documentation |
| Attach/List copies of all documents that support the claims or assumptions in the business plan: resumes of the owners/operators, certificates and references, licences and permits, market research details, product or service details, contracts or correspondence with suppliers and customers, extracts from publications, maps, financial plan etc. |

|  |
| --- |
| Business Action Plan |
| Prepare a mini 12-month Action Plan. This plan will then become a checklist of the key actionable items and when they are due for completion. Use the table below as a guide. These tasks should not be too detailed or else they become unworkable.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|

|  |  |
| --- | --- |
| Timeframe | Tasks |
| **MAYBE MARKETING TRIPS** | * From time to time I may have opportunity to do marketing either interstate or overseas. These will be advised to the business solutions coach, who will note my leave date and return date plus view and have on her files my travel insurance. I will remain contactable during this time via email/skype etc., and will advise the business solutions coach which method of communication will be most productive.
* I understand that the monthly contacts must be made and responded to. I understand that quarterly income statements and mentoring sessions can be done by skype facetime etc., if my trips cover this period of time.
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| **MAYBE WORK** | * Income may be derived in a related field to my business as a consultant as an additional source of income from time to time, but only on an occasional basis short term, and will all be noted on my quarterly income statements.
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| Week 1 |  |
| Week 2 |  |
| Week 3 |  |
| Week 4 |  |
| **Month 1** |  |
| **Month 2** |  |
| **Month 3** |  |
| **Month 6** |  |
| **Month 9** |  |
| **1 year** |  |
| **15 months** |  |
| **2 years** |  |

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