

# Business Plan Guide for Companies Readiness SME's Development

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# Business Plan Guide for Companies

## 1. EXECUTIVE SUMMARY

The purpose of an executive summary is to provide a quick and concise overview of the business (in one or two pages).

The plan summary should highlight key elements of the entire business plan, including:

This section should highlight various aspects of product/service offerings, the history in the field. The key elements in these sections.

## 2. Company profile

### - Company Mission, Vision & Objectives

- Objectives should cover different areas as follows:
- Financial objectives such as revenues & margin enhance ROI by xx percent.
- Customer related objectives such as how to gain customers satisfaction or retain customers,
- Internal operational objectives such as enhance delivery time or deliver quality products and services, enhance duration and cost of production, lead-time, customer response time, etc.
- Company structure of ownership
- Organizational Structure.

## 3. Marketing Strategy

The situation analysis describes the market, the company's capability to serve targeted segments, and the competition.

### 3.1. Market Summary

In the section the company is obliged to represent the market summary includes all of the following, Size, Needs, Growth, Trends and Describing the targeted segments in detail provides context for marketing strategies and programs discussed later in the plan.

### 3.2. Product Portfolio Analysis

This section describes the products and services company offers with a brief description of each product/service. You should be able to describe what you are selling as well as identify what makes your product or service unique. In addition, provide product lifecycle plan, product portfolio analysis, and BCG (Boston Consulting Group) matrix for all the company's products/services. This section should include:

- Historical revenue per product per target segment per month for the last 3 years (depends on years of operation)
- Revenue forecast per product per quarter for the next 5 years

### 3.3. Competition

In the section the company should well demonstrate a comprehensive Strengths, Weaknesses, Opportunities, and Threat Analysis SWOT and to be explained through SWOT matrix.

### 3.4. SWOT analysis

This section identifies key competitors, describes their market positions, and provides an overview of their strategies and product pricing and offerings.

### 3.5. Distribution

Distribution explains current channels and/or partners detailing historical revenues/channel for the company's products and mentions new developments and trends.

### 3.6. Strategic Elements

- Product strategy includes decisions about product mix and lines, brands, packaging and labeling, and warranties.
- Pricing strategy covers decisions about setting initial prices and adapting prices in response to opportunities and competitive challenges.
- Distribution strategy includes selection and management of channel relationships to deliver value to customers.
- Marketing communications strategy covers all efforts to communicate to target audiences and channel members.

### 3.7. Marketing Action plan

- Provides a detailed action and expenditure timely plan to execute the marketing strategy.

## 4. Sales Strategy

Develop the sales strategy and sales team approach Identifying number of sales men, sales quotas, commission, and any other extra costs in addition to identifying the appropriate lead generation sources.

## 5. Sales Plan

Develop sales forecast and territory management. This includes sales organization; sales approaches for different target segments. Provide sales forecast per sales man, per product, and per target segment. This includes detailed sales plan, including costs and revenues. This should include:

- Current Portfolio Sales Contribution: Sales by product/segment
- Sales/Operations Channels: What are the key sales channels, and what are differentiation strategies to grow

- Sales Growth Drivers/Enablers: What are the drivers, initiatives to grow business?
- Sales Growth Projections: What are the projections of growth % ST and LT.

## 6. Resource plan

- Develop a resource plan based on the marketing and sales forecasts, personnel resources necessary to undertake that forecast as headcount and average salaries.
- Any additional resource needs including technological needs, capacity building, business and operational improvement, and/or other resources necessary to implement this business plan.

## 7. Initiatives

- Internal projects or task company plan to do to be able to execute strategy, such as get fund, write process for how to issue LG, etc.

## 8. Technical Capabilities

### 8.1. Company accreditations

Specify any local or international accreditations/certifications obtained by the company and dates of accreditations.

### 8.2. Previous Clients/Projects

Specify the company's key customers' profiles, industries and engaged projects

### 8.3. Used tools (environment)

Illustrate the company tools used for development and managing the application lifecycle.

### 8.4. Development process

Illustrate the company adopted development processes. Processes should be clearly illustrated on high level using adequate diagrams and text descriptions.

### 8.5. Product/Service Features (if applying for specific product/service)

In case of application for a specific product or service fund, describe the product/service features. Features may be classified to functional and non-functional features. Functional features can be classified to core and supplementary features. Non-functional features can be classified to portability (e.g. supported platforms), security, performance (e.g. real-time) and interoperability (e.g. integrations with other systems) features.

### 8.6. Implementation Plan (OR Improvement plan if applying for operational expenses)

In case application for a product/service fund, illustrate the implementation plan. In case of application for operational expenses fund, illustrate the improvement plan. Plan should include the required team (roles), milestones, resources, effort and risks.

### 8.7. Implementation team qualifications, roles and skills

For each team member, specify the role, skills and practical experience highlights and the received qualifications (university degrees, professional certifications, etc.)

## 9. Financials

- Financials include budgets and forecasts to plan for marketing expenditures, scheduling, and operations. Provide last year actual financial statements as approved by an authorized accounting office. Provide (loan period +1 year) year's budget forecast versus last year actual. Forecast Financial statements of Profit & loss, Cash Flow, and Balance sheet identifying all expenditure elements as well as all economic assumptions used to build up the financials.

## 10. Controls

- Controls are being established to cover implementation and the organization of marketing activities.
- Controls help management measure results and identify any problems or performance variations that need corrective action.
- Identify all controls & KPIs (both financial & operational) in place to assure achieving the business plan

## 11. Supporting Documents

- Provide all necessary documents to support the business plan e.g. Company's business processes (narrative document and flowchart), team members resumes, customer acceptance documents, etc.