

## **Business Fact Sheet – Your Business Plan**

Sick of “fighting fires” and always being on the back foot? A Business Plan is a powerful way to plan ahead and get on the front foot. Be proactive, anticipate problems and issues and take advantage of opportunities.

This takes an investment of time. You, like most business owners, have a plan in mind. A good way to develop, share and test that it is workable, is to use a ‘Short Form’ Business Plan. The two-page plan format below can be a good start and one to build on.

**Business Name:** \_\_\_\_\_ **Plan Year(s):** \_\_\_\_\_

### **Contents**

1. About the Business
2. Key Objectives
3. SWOT analysis
4. Specific Actions and Plans – Strategies
5. Organisation Chart – current and planned
6. Budget and Financial Projections

#### **1. About the Business**

- What does your business do?
- Do you have a key mission? e.g. Create and sell quality Artisan Bakery products.
- What is your value proposition?
- What are you known for?

#### **2. Objectives** – What are your goals and objectives?

- Establish... e.g. Sydney based business - a new branch in Melbourne
- Obtain... e.g. Restaurant - obtain a liquor licence.
- Maintain ... e.g. Distributor – retain the current product distribution rights.
- Achieve ... e.g. Increase sales by 10% on last year.
- Generate...e.g. New online sales of \$X.

Be specific and use measures where possible – dates, size, percentages etc.

#### **3. SWOT Analysis**

<b>Strengths (Specify)</b>	<b>Weaknesses (Specify)</b>
e.g. Family Restaurant – value for money	e.g. Lack of skilled staff in key areas
<b>Opportunities (Specify)</b>	<b>Threats (Specify)</b>
e.g. Retailer – On line sales	e.g. New competition

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## 4. Specific Actions and Plans – Strategies

Sales and Marketing e.g. New salesperson. Promote online sales.

Operations: e.g. New equipment, implement paperless systems.

Staff: e.g. New staff required. Skills development training plan for current team.

Financial: e.g. Funding Plan for the next 3 years.

Systems and IT: e.g. New system to integrate Sales, Operations and Finance, New website.

These strategies should capitalize on your strengths and opportunities and address your weaknesses and threats. Include the options you considered and a cost/benefit analysis.

## 5. Organisation Chart – current and planned

People and roles: note staffing gaps and key areas for improvement or restructuring to build and develop the team.

Who does what: Ensure all key functions are covered and avoid gaps. If you don't, all the problems end up in the too hard basket – for the owner – you!

## 6. Annual Budget and Year 2 and 3 Projections

Profit and Loss – Year 1/Annual budget and Year 2 and 3 projections.

	Current	Year 1/Budget	Year 2	Year 3
<b>Profit and Loss</b>				
<b>Sales</b>				
<b>Cost of Sales</b>				
<b>Gross Profit</b>				
<b>Gross Profit%</b>				
<b>Overheads</b>				
<b>Staff</b>				
<b>Rent</b>				
<b>Other Expenses</b>				
<b>Total Operating Expenses</b>				
<b>Net Profit</b>				
<b>Tax</b>				
<b>Net Profit After Tax</b>				
<b>Capital Expenditure</b>				
<b>Asset Disposals</b>				
<b>Other major items (Specify)</b>				

**Optional extra** - Balance Sheet & Cashflow Projection – An Accountant can help you here.

**For a template of the above plan format – email us using the email address below.**

## Don't get caught short or Playing catch up!

- ✓ Set goals and develop strategies for the next 3 years
- ✓ Prepare financial targets to ensure the numbers stack up
- ✓ Track to your Plan and review it annually.

**Fighting fires takes its Toll. Plan instead to keep one-step ahead!**

**A professional with commercial experience can review your business and help you develop your Business Plan.**

**Contact us Today!**

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