

Toolkit - Resources for trainers

Business Plan

Objectives and how to use it

This document can be used as a template for the creation of social enterprises.

With the help of this template the trainee will be able to:

- Analyze different elements of his/her business idea
- Evaluate the mission, the strategy and resources
- Reflect about the business idea

Description

This template is a guide to evaluate business ideas on and the state of businesses already implemented. Just with the help of an evaluation process improvement can be achieved.

Resources / Material required

The trainee should fill in the template with enough time to fill-in this template. Moreover, trainers are invited to add more points to the template, depending on the needs of their trainees.



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1. Mission and vision

1.1 Activity of the company and segment in which it operates

The company's activity must be based on a specific business idea.

1.2 Competitive advantages and business culture or business model

The following are two key concepts for the development of my business project:

- Competitive advantages
- Business culture

Competitive advantages

Competitive advantage refers to the advantage that a company has over other competing companies. In other words, it is the element or elements that differentiate my company from the rest and that will allow me to get ahead of my competition.

Specifically, they are:

Dimension	Mark with an x	Observations



1.3 Legal formula

Write down which is the legal context and setting of the company.

1.4 Place of implementation of the company

Where is the company based?

1.5 Types of customers and markets where it is located

Write down all types of customers and markets that you are operating in.

2. Resources

In this analysis of the resources necessary for the implementation of the business idea, the following elements are analysed:

- Technical means and economic resources
- Strategic alliances foreseen
- Human resources and professional profiles required
- Training itineraries

2.1 Technical and financial resources

The technical means necessary for the start-up of the business are as follows:

Nº	Types of technical resources



2.2 Strategic alliances

Cooperation between companies is becoming more and more frequent in the business world and has become an irreversible fact, especially in the most competitive sectors, such as the industrial sector. For this reason, the following alliance is planned:

2.3 Human resources and professional profiles required

Professional profile	Selection mechanism	Type contract	of	Observations

2.4 Necessary training pathways

In order to draw up a training pathway, I have taken into account the following dimensions:

- Identification of training needs
- Designing the training plan
- Search for funding

After an analysis of these variables, the necessary training pathway is as follows:

Title of course	Teaching area	Place of training	Mode	Duration



3. Strategies

The business plan takes into account the following strategies:

- Marketing plan and business strategy
- Operations and procurement plan
- Risk analysis and mitigation
- Economic analysis and financing plan

3.1 Marketing plan & business strategy

To create the marketing plan you have to analyse four fundamental variables, called the "4Ps".

- Price
- Product
- Points of sale
- Promotion

In addition, the following advertising channels or techniques will be taken into account:

Channel or technique	Priority	No priority	Observation

3.2 Operations and procurement plan

The operations plan summarises all technical and organisational aspects that concern the production of the company's products. It contains four parts: products or services, processes, production schedule, and procurement and stock management:

In order to select the supplier companies for my business, I have taken into account the following criteria:



Relevance of the criteria for supplier selection	Chose: High, medium, low

3.3 Risk analysis and mitigation

The business plan includes an analysis of the risks in order to predict what the consequences might be, and how to mitigate them.

Risk type	Yes / No	Observations



3.4 Economic analysis and financing plan

Below is a forecast of my investment plan, showing each of the cost items, and my business financing plan:

Investment plan (euros)

Inversion concepto	Euros
Total:	

Financing plan

Own resources	
Loans from relatives /friends	
Loans from banks	
Credit policies	
Entrepreneurship grants	
Total	

