

Business plan

Insert business name

Insert business owner(s) name(s)

Date: dd/mm/yr

Business name

Business address line 1

Business address line 2

Post code

Tel:

Your Local Enterprise Agency:

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Section 1 – Business details

Business name:

Business address:

Post code:

Telephone:

Mobile:

Fax:

Web address:

Email address:

Business start date:

Full time business Part time business (*Insert a tick or highlight the box*)

Will the business be VAT registered?

Yes No Not sure (*Insert a tick or highlight the box*)

Legal status: (*Insert a tick or highlight the box*)

Sole trader Partnership Limited Company Other:

Franchise Yes No

Section 2 – Product or service

Product or service (*Provide a description of the product or service. If applicable, include details of any unique selling points (USPs) or competitive advantages.*)

Future plans (Are there plans to develop the product(s) or service(s), or add new product(s) or service(s), in the future?)

Section 3 - Marketing

Market research (Describe how the market research was carried out.)

Customers

Who are the customers (e.g. market segments)

What the needs/wants of the customers?

Describe the spending behaviour of customers (e.g. how much do they spend, when do they spend and how do they pay?)

Market trends or issues (Describe any trends or key issues that are affect the marketplace)

Competitors (Who are the competitors and what are their strengths and weaknesses?)

Competitor	Strengths	Weaknesses
Competitor 1	•	•
Competitor 2	•	•
Competitor 3	•	•

Promotion (Use the table below to provide details of the promotional plan.)

Promotional method	How	When	Cost
			Total

Place/channels of distribution (Describe the 'place' or channel(s) of distribution)

Section 4 – Operations

Operations

Premises (Provide details of the business premises e.g. location, size, alterations required, storage facilities, costs)

Suppliers (Provide details of suppliers e.g. names, addresses, credit terms)

Production process / service delivery (If applicable, describe the production process or how the service is carried out e.g. length of time, factors involved)

Quality control (If applicable, describe any quality control measures that will be used in the business.)

Other operational issues

Section 4 - legal issues

Legal issues (Provide details of the relevant legal issues associated with the business.)

Legal issue	Details
Lease or licence agreement	Applicable yes <input type="checkbox"/> No <input type="checkbox"/> (if yes please provide details)
Planning permission	Applicable yes <input type="checkbox"/> No <input type="checkbox"/> (if yes please provide details)
Health and safety	Applicable yes <input type="checkbox"/> No <input type="checkbox"/> (if yes please provide details)
Insurance requirements	Applicable yes <input type="checkbox"/> No <input type="checkbox"/> (if yes please provide details)
Trading licences, certificates or permits	Applicable yes <input type="checkbox"/> No <input type="checkbox"/> (if yes please provide details)
Employment legalisation	Applicable yes <input type="checkbox"/> No <input type="checkbox"/> (if yes please provide details)
Others e.g. <ul style="list-style-type: none">• Data protection• Intellectual property• Environmental health• Food regulations• Distance selling	

Section 5 - People

Business owner details

(Use a separate sheet if there is more than one business owner.)

Name:

Address:

How many years have you lived at this address:

Tel: Home:

Mobile:

DOB:

National Insurance Number:

Experience / training / qualifications / skills / interests / hobbies

(Provide details of any experience, training, qualifications, skills, interests or hobbies that are applicable to the business idea.)

Staffing requirements (If applicable, describe the staffing requirements of the business and provide details of the costs.)

Professional services, professional bodies/trade associations and support organisation(s)

Type	If applicable, provide contact details e.g. name, address, tel
Accountant	
Solicitor	
Bank	
Professional body/ trade association	
Other e.g. <ul style="list-style-type: none">• Family and friends• LEA• Invest NI• Mentor/advisor• Chamber of commerce• Networking organisation	

Section 6 - Finance

Capital costs (This information may be found in the cash flow forecast)

Capital items owned	Value £
Equipment/tools	
Fixtures & fittings	
Vehicle	
Security & safety	
ICT	
Office Furniture	
Kitchen	
Total	

Capital items required	Value £
Equipment/tools	
Fixtures & fittings	
Vehicle	
Security & safety	
ICT	
Office Furniture	
Kitchen	
Total	

Variable costs (This information may be found in the cash flow forecast)

Variable costs e.g. stock, materials	Costs per annum
Insert type of variable cost	
Insert type of variable cost	
Insert type of variable cost	
Total variable costs	£

Fixed costs (This information may be found in the cash flow forecast)

Fixed costs	£
Rent & rates	
Heat & power	
Tel & internet	
Vehicle expenses	
Advertising & promotion	
Office supplies and postage	
Sundries	
Accountancy & legal	
Insurance	
Sundries	
Staff costs	
Finance charges	
Drawings	
NIC (Class II)	
Other _____	
Other _____	
Other _____	
Total	

Pricing (Provide pricing details of the product(s) or service(s).)

Credit terms (If applicable, provide details of any credit terms.)

Sales (Provide the monthly sales projections for the first 12 months of business trading.)

Month	1	2	3	4	5	6
Sales £						

Month	7	8	9	10	11	12	Total
Sales £							

Sales assumptions (Provide details of the sales assumptions.)

Funding (Provide details of how the business will be funded)

Appendices