

# Business Plan Primer

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Prepared for  SCRA

Why does Business Planning matter?

“Few people have any next, they live from hand to mouth without a plan, and are always at the end of their line.” — *Ralph Waldo Emerson*

# Get the most from our time together



# WHO AM I?



**Jerry Pilewski**



**Certified Executive Coach**  
Executive Coaching Program  
FOCALPOINT COACHING & TRAINING EXCELLENCE



**Navigation Conversations**  
Certified Facilitator

**SCRA**  
Resource Partner

**SC MEP**  
Provider



# Permission and Promise



## Goal for today: Organize EVERY business thought

1. Understand four types of business leadership challenges
2. Learn the skeletal structure for your business
3. Business plan inception – create a living being

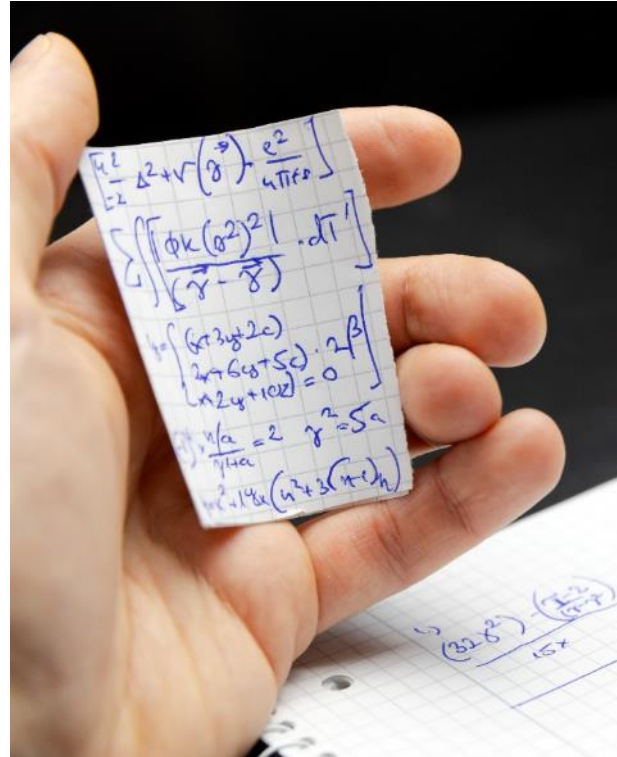
# CHALLENGE TYPES FACED BY ALL BUSINESSES LEADERS



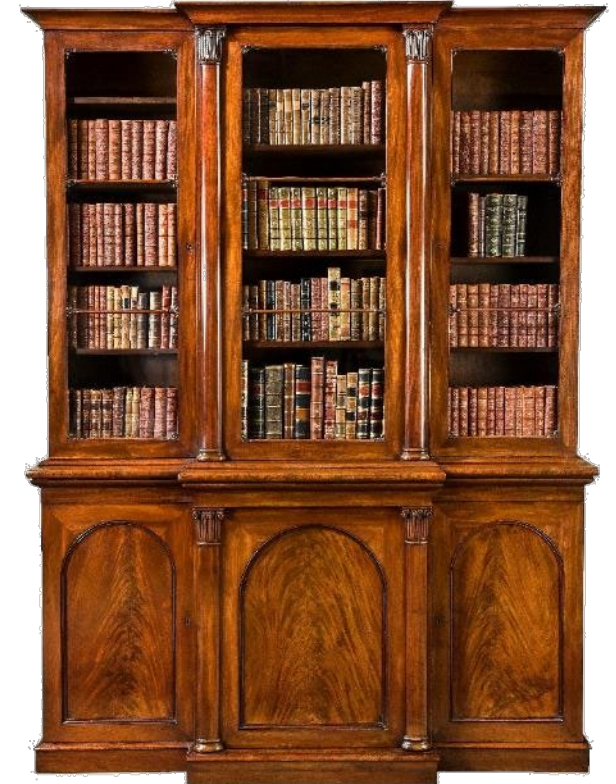




“Chasing the Pitch”  
Too Myopic



“One Page Plan”  
Too Simple



“The Perfect Plan”  
Too Stale





**OR**



- 1. Purpose, Mission, Values**
- 2. Abstract / 1-Page Business Plan**
- 3. Key staff**
- 4. Product Analysis**
- 5. Target Customer**
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- 15. Appendix/Footnotes**

# 1. PURPOSE, MISSION, & VALUES

Your why, how, and behavior

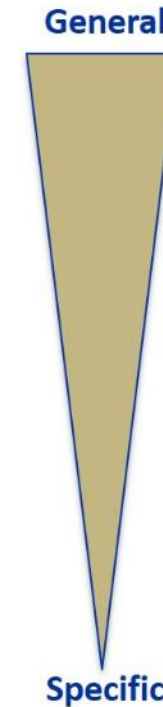
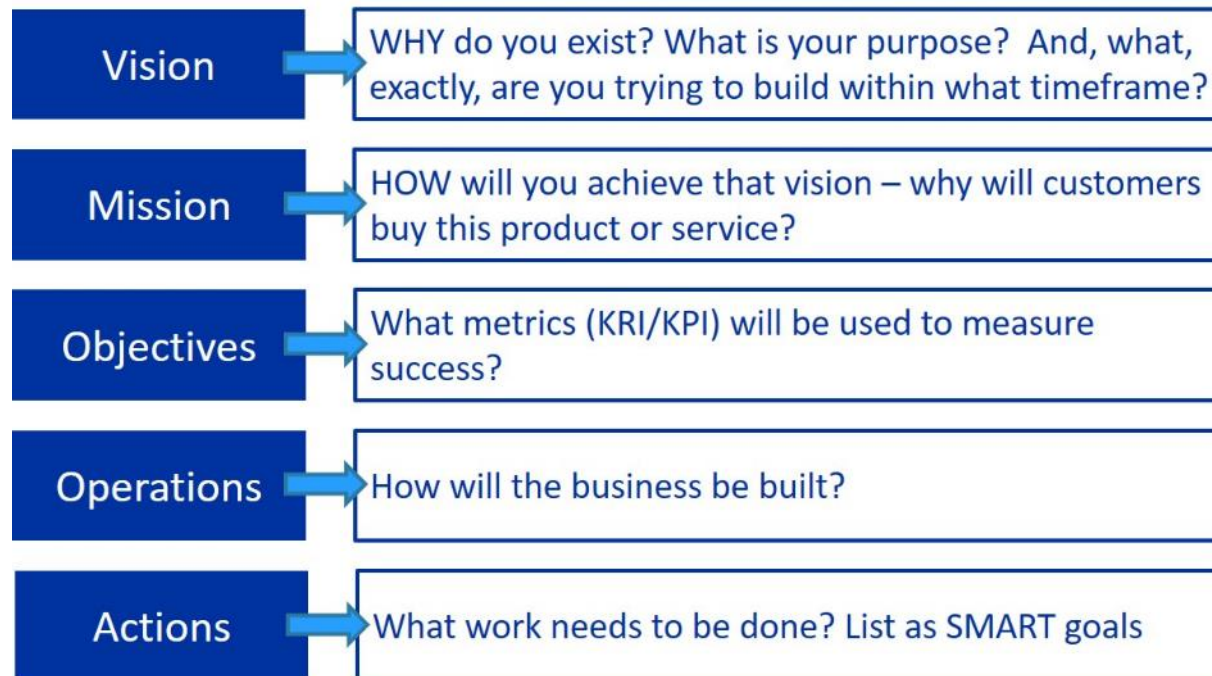


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## 2. Abstract/1-Page Business Plan

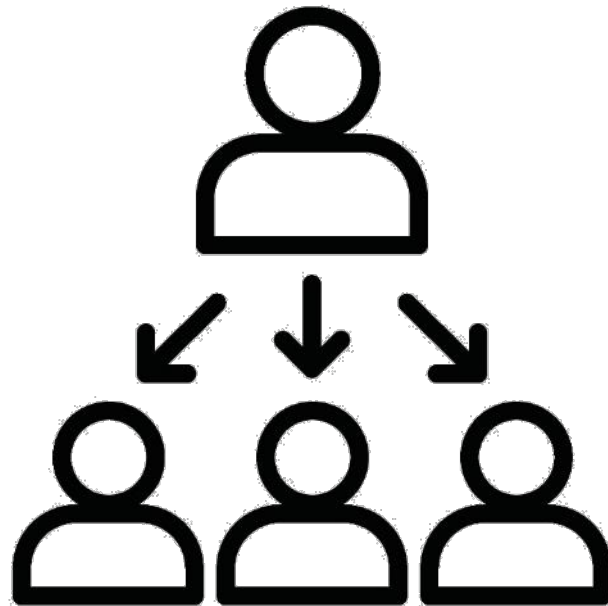
Vision for the next year



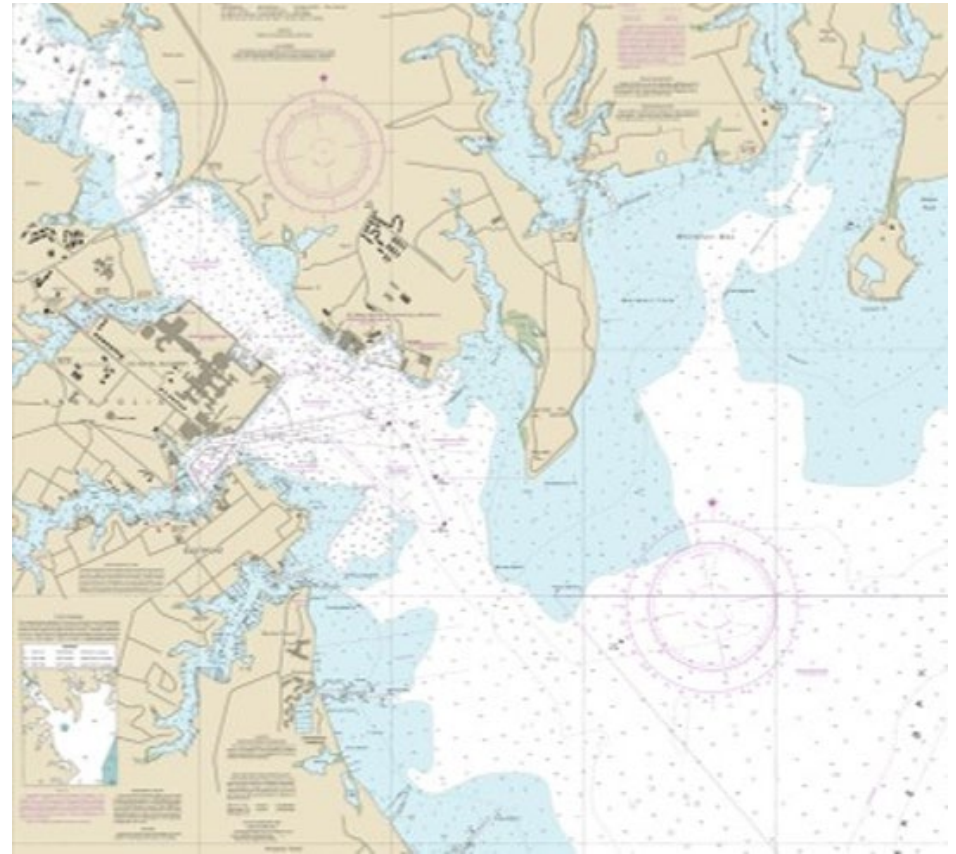
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## 3. Key Staff

Identification/org chart/key staff with KPI/KRI



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## 4. PRODUCT ANALYSIS

Deliverables – products and services



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## 5. TARGET CUSTOMER

Internal and external customers; Demographics of existing/potential markets



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## 6. CLIENT ANALYSIS

Interviews with Customer Base; product need/desire confirmation



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## 7. MARKETING & SALES PLAN

Most efficient use of resources to best reach & close your customer



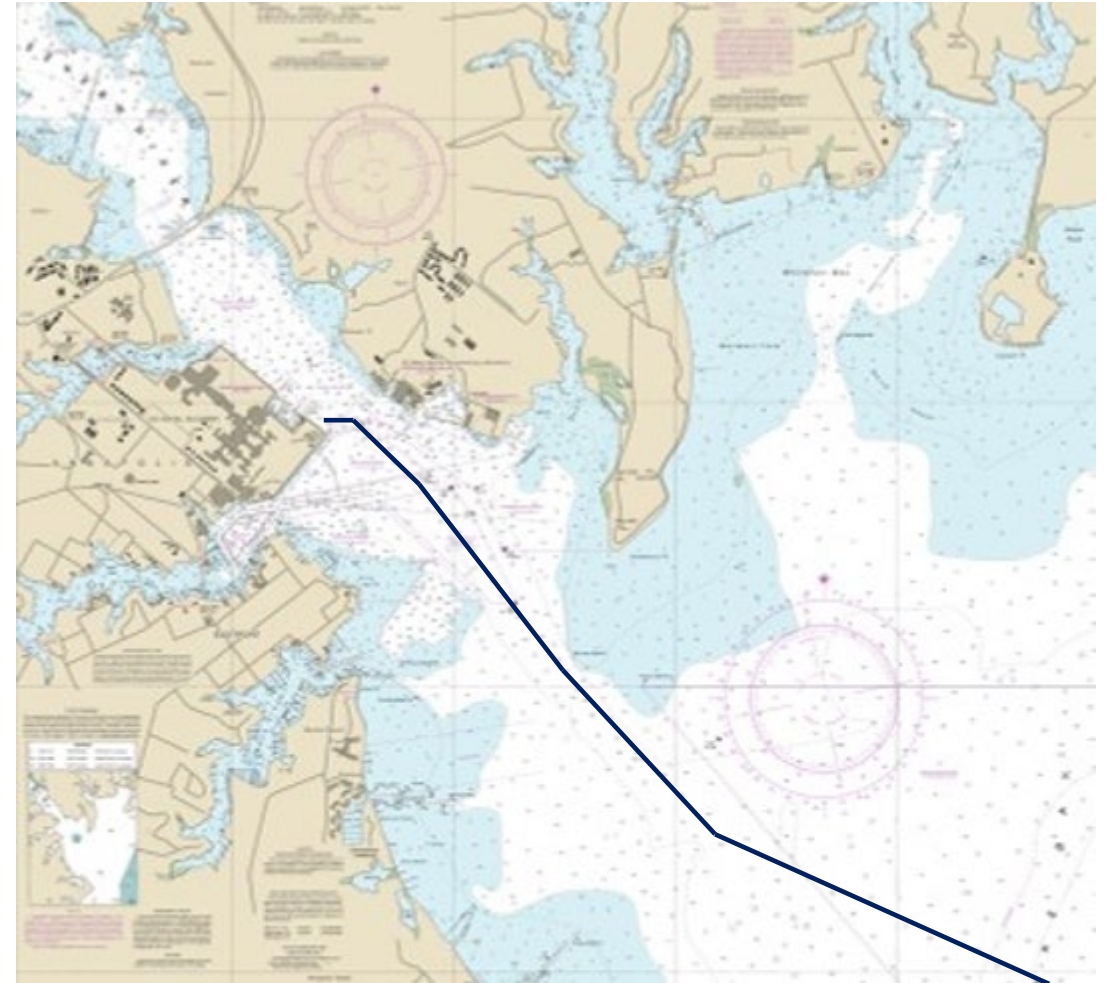
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## 8. COMPETITIVE PROFILE

List of competitors and their strengths;  
Verify & exploit market gaps

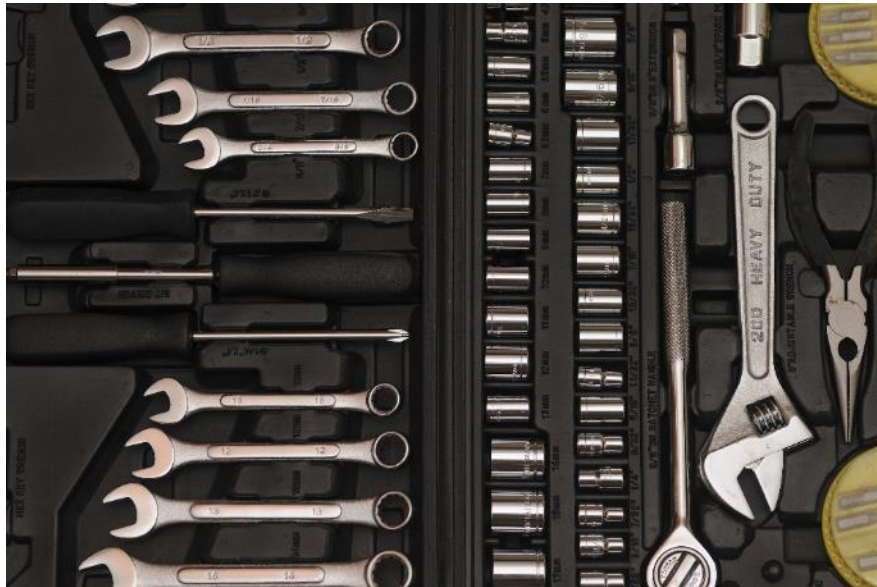


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## 9. OPERATIONS

Goals, Focus Areas, Procedures



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# 10. LEVERAGE & STRATEGIC PARTNERS

Synergistic/complementary



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# 11. BRANDING & GOODWILL

Maintaining differentiation, Developing goodwill



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# 12. BUDGETING & ACCOUNTING

## Financial Statements

	Y2013	Y2012	Y2011
Revenue	89,519,985	88,799,737	88,549,724
Sales	(236,385)		(233,835)
Cost of goods sold	89,279,850		8,315,889
Profit	4,989,367	3,877,538	3,535,183
Income	1,300,000	1,504,100	1,115,229
Dividend income	3,400,000		1,178,111
Rent income			604,390
Interest income			
Other income			
Before expenses	47,162		213,600
Expenses	(44,377,000)	(56,451)	(15,000)

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# 13. PROJECTIONS

1, 3, 5 year



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# 14. Funding/Investment Analysis

## Key Ratios; Operational Finance



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## 15. APPENDIX / FOOTNOTES

External/backup documents which verify paragraphs 1-14



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## **TAKE AWAY'S**

TO GET THE BENEFIT:

1. What were your key take-away's?
2. Commit to action  
(knowledge vs. applied knowledge)
3. How will you apply it?

# THANK YOU SCRA

**Build significance through business!**



**Jerry Pilewski**

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