A business plan is a roadmap that outlines your business goals and tells how you plan to achieve them, including descriptions of your value proposition, market environment, operations strategy and financial data. The plan can cover your entire company or a specific product, portfolio or service.

The business plan provides evidence that you are capable of managing all aspects of your business successfully. It creates a foundation for strategy, operational management and performance measurement.
Create a first version of the plan using the structure outlined below.

1: YOUR ORGANIZATION IN BRIEF
Structure, history and current status
- Legal structure (entity, ownership)
- When and by whom the enterprise was founded
- How it developed
- Current status (e.g. key figures including net worth, net sales, number of employees)

Team
- Members of management team: distinguishing experiences and abilities
- Motivation and ambitions with respect to your business
- Gaps and how they will be remedied

Achievements and milestones
Describe the goals you have achieved to date, in chronological order. Include instances of formal recognition (e.g. awards, honors).

2: ENTERPRISE
- Value Proposition
- Product / Service Description
- Impact (community engagement, environmental / social benefit)
- Mission (in thirty words or less)

3: MARKET STRUCTURE
- Market environment
- Customer Analysis
- Competitor analysis

4: OPERATION
- Operation strategy
- Value Chain (sourcing, assembly, service, partners and agreements)
5: MARKETING & DISTRIBUTION
- Marketing strategy
- Distribution strategy
- Sales targets

6: RISK MANAGEMENT
- SWOT Analysis
- Risk Analysis and mitigation measures

7: DOCUMENTATION (APPENDICES/SOURCES)
List essential source documents you have used to provide the information in the plan and which will be enclosed with it. For example:
- Quarterly reports
- Government publications with demographic data
You are ready to begin writing a detailed business plan that will help you attract investment and manage the business successfully.

This tool is based on the document ‘How to write a business plan’ by McKinsey & Company
Use when an enterprise must convince investors and others of its viability and potential. Particularly in industries where innovation is critical, it's important to present the right mix of people and resources and to show a firm understanding of all the forces at play. A good business plan answers the most relevant questions of investors and partners.
PARTICIPANTS DO THE WRITING
Enterprises must write their own business plans. You can help to refine the plan, but to create ownership and understanding the enterprise needs to do the work.

IDENTIFY MISSING INPUT
Note any topics for which input is missing and use other tools to fill the gaps. Plan follow-up sessions to fill in missing information.

FOCUS ON ESSENTIALS, NOT VOLUMES
It is not the volume of analysis and data, but rather concentration on the essential arguments that will persuade readers. Any topic that could be of interest to the reader should therefore be discussed fully, but concisely. Limit the length to 35 pages, this is usually more than enough to communicate all essential information.

PLACE EMPHASIS ON EVIDENCE, NOT ENTHUSIASM
Readers are looking for evidence that the business is viable and potentially successful. Explain to participants that ‘advertising copy’ can frustrate and alienate these readers. Make use of credible sources.

AVOID SELF-CRITIQUE
Encourage participants to not hide gaps or weaknesses, but not to dwell on them in a negative way the implies that they doubt their abilities. They should present solutions where gaps are identified.

AVOID JARGON
A good business plan can be understood by a layman. Explain to participants that great technical detail will not impress these readers. If precise technical details are needed, they should be placed in appendices.

OTHER TOOLS FROM THE TOOLKIT CAN BE USED
If needed, the following tools can be used to complete sections of the Business Plan individually, either as preparation or a separate exercises within a workshop:
- Risk Analysis
- Marketing
- Distribution
- Value Proposition
- Customer Segmentation
- Planning for impact

HAVE PARTICIPANTS COLLECT DATA IN ADVANCE
Much information is needed to complete the business plan. Send a checklist in advance, with a request to obtain all available relevant documentation.
TIME
As little as 1 day for a basic outline, or up to several weeks for ‘deep dives’ into every subject. In a day workshop, each of the sections you can take between 30 and 45 minutes, with a break at the end of the day to consolidate and discuss results.

MATERIALS
Large print, drawing or slide of the worksheet; pin board or whiteboard; workshop materials (markers, cards, lots of Post-its, etc.)
Using the worksheet, a questionnaire can also be prepared to collect the information during the session. This can be used to interview the client.

TEAM
You will need one facilitator and one or more people representing the main parts of the client enterprise. For larger groups: have people in smaller groups fill in each section and present the outcomes. Follow-up sessions can be carried out with separate groups to fill in specific gaps.

DOCUMENTATION
Use flip-overs to capture each element. If you are working in groups, let the groups present their work to the other groups.
Work with Post-its so you can add and remove elements easily.
**BUSINESS PLAN**

A roadmap that outlines your business goals and tells how you plan to achieve them.

### YOUR ORGANIZATION IN BRIEF
- Structure, History, and Current Status:
- Team:
- Mission:
- Achievements and Milestones:

### ENTERPRISE
- Value Proposition:
- Product/Service Description:
- Impact (Community Engagement, Environmental/Social Benefit):

### MARKET STRUCTURE
- Market Environment:
- Customer Analysis:
- Competitor Analysis:

### MARKETING & DISTRIBUTION
- Marketing Strategy:
- Distribution Strategy:
- Sales Targets:

### RISK MANAGEMENT
- SWOT Analysis:
- Risk Analysis and Mitigation Measures:

### OPERATION
- Operation Strategy:
- Value Chain (Sourcing, Assembly, Service, Partners, and Agreements):

### List of Appendices and Sources: