Tool P3.S4.T1\_Business plan format \_ Simplified version

**Objective of the tool**: Obtain a single document with the definition, vision and economic information of the income-generating activity selected by the beneficiary / target group.

## General information

|  |  |  |  |
| --- | --- | --- | --- |
| Title of the business | | Type | Business code |
|  | |  Individual  Group |  |
| Sector | | Business type | Location |
| □Agriculture □Manufacture; □Services □Trading | |  |  |
| Name of the <entrepreneur / or Name of the group> | | | Household size |
|  | | |  |
| Address (Street, Province, Town, Postal Code) | | | Region |
|  | | |  |
| ID | Mobile, Telephone | | Age |
|  |  | |  |
| Sex | Email | | Social media |
|  |  | |  |

# **Personal information**

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| Personal situation. Experience, skills, motivation, physical and financial assets. |
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## Describe the market

Inform of the potential market to which the project is directed, indicating its main characteristics and briefly explaining its volume.

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| Main customers/customer segment |  |
| Competitors |  |
| Key partnerships  Suppliers, banks, non-direct partners, transporters, etc) |  |

## Describe the product /Service

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| --- | --- |
| Product | Describe product range, Quality, Conception, Packaging, Maintenance, Service, Warranty, Return policy |
| Pricing | Pricing strategies (e.g. introductory prices), Prices for different market segments, Pricing of alternative products, Sales and promotions. |
| Distribution | Define how the products/services will be sold (point of sale, markets, home delivery, etc.)**.**   Physical shop  Market stall  Space in a wholesale market  Mobile stall  Online shop |
| Promotion | Define how and through which channels the products/services will be promoted to potential customers (type of communication, how, frequency, etc.). |

## Operation of the business

Identifying **key activities** and **key resources** needed

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| Key activities  Identify and list the activities that essential to the functioning of the entrepreneurship (supply, production, sale, etc.), to achieve the value proposition, as well as to the product / service sales process. Also list those which are essential for starting the economic activity. | | | |
| ACTIVITY | | **Frequency** | **Critical / important things to consider/ Responsible** |
| Activities necessary for start-up | | | |
| 1. 1. | |  |  |
| 1. 2. | |  |  |
| 3. | |  |  |
| 4. | |  |  |
| Operations | | | |
| 1. 1. | |  |  |
| 1. 2. | |  |  |
| 3. | |  |  |
| 4. | |  |  |
| Promotion and sales | | | |
| 1. | |  |  |
| 2. | |  |  |
| 3. | |  |  |
| Other activities | | | |
| 1. 1. | |  |  |
| 1. 2. | |  |  |
| 1. 3. | |  |  |
| 1. 4. | |  |  |
| Key resources List the essential resources for the smooth running of the activities (premises, machines, resources or transport services, packaging, training, promotion, etc.-, economic resources, human resources, etc. | | | |
| TYPE OF RESOURCE | **DETAIL** | | |
| 1. Equipment |  | | |
| 1. Tools |  | | |
| 1. Inputs |  | | |
| 1. Utilities and services |  | | |
| 1. Human resources |  | | |
| 1. Others |  | | |

## Economic and Financial plan

1. Start-up capital (budget)

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| --- | --- | --- | --- | --- | --- | --- | --- |
| INITIAL INVESTMENT REQUIRED | | | | | | | |
| Equipment, tools, and other fixed assets required to start the business | | | | | | | |
| Nº | **Type of investment** | **Qty.** | **Unit** | **Unit cost** | **Total** | **Life cycle** *(years)* | **Amortized amount per year** |
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| S1 | **TOTAL** | | | |  |  |  |

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| START UP WORKING CAPITAL REQUIRED | | | | | | |
| Initial variable capital for the first cycle or until the business is fully running. | | | | | | |
| Nº | **Type of cost** | **Qty.** | **Unit** | **Unit cost** | **Months covered** | **Total** |
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| S2 | **TOTAL** | | | |  |  |

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| --- | --- | --- | --- |
| Summary. Start-up capital | Tools/equipment (S1) | Working capital (S2) | Total (S1 + S2) |
| Total Start-up capital needs (S1 + S2) |  |  |  |

2. Economic and financial Annual Plan

**Sales forecast per cycle**

For the planned products/services in your business, write down the estimated sales for a given period (business cycle).

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| **Product/service** | **Units sold (estimate)** | **Unit cost** | **Unit price** | **Business cycle** |
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| Production cycle: | Number of cycles per year: |

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| --- | --- | --- | --- | --- | --- |
| INCOME PER CYCLE | | | | | |
| A-Nº | **Product / service** | **Unit Quantity** | **Unit** | **Unit Price** | **Total** |
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| A1 | **TOTAL** | | | |  |

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| --- | --- | --- | --- | --- | --- | --- | --- |
|  | EXPENDITURE PER CYCLE | | | | | | |
| B-Nº | **Type of expenses** | | **Quantity** | **Unit** | **Fix or variable cost** | **Unit cost** | **Total** |
|  |  | |  |  | 🞏 Fix 🞏 Variable |  |  |
|  |  | |  |  | 🞏 Fix 🞏 Variable |  |  |
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| B |  | **TOTAL** | | | | |  |

**Fixed costs:** utilities, inputs, rent of the premises, salaries, etc., which do not depend on the number of units produced (or level of activity).**Variable costs:** inputs, raw materials, human resources directly linked to the production or service provision (e.g., daily workers), packaging, storage, transport costs, etc. that vary according to the number of units produced (or the level of activity)

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| --- | --- | --- | --- | --- | --- | --- | --- |
| PROFIT | | Amount | Nº. Cycles |  | Year 1 | Year 2 | Year 3 |
| A | **INCOME PER CYCLE** |  |  |  |  |  |
| B | **EXPENSES PER CYCLE (B\* Production cycle)** |  |  |  |  |  |
| AT | **Amortization** |  |  | **0** |  |  |
|  | **NET PROFIT (A-B-AT)** |  |  |  |  |  |

3. Financial sources of income (start-up phase)

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| --- | --- | --- | --- | --- |
| SOURCE OF INCOME | | | | |
| Start-up grant | **Beneficiary contribution** | **Loan from Bank/MFI** | **Any other source** | **Total** |
|  |  |  |  |  |

## Critical risks & challenges

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