



StartUp
Mendocino

BUSINESS ACCELERATOR

2023

Business Planning: Where Are You Going?



Agenda



Business Plan:
Contents and
Checklist



Organize Your Plan

BUSINESS PLAN CHECKLIST	
COVER PAGE <ul style="list-style-type: none">Business NameAddressPhone NumberFax NumberEmail AddressPrincipal Owner(s)Date of IssueCopy Number	EXECUTIVE SUMMARY CONT. <ul style="list-style-type: none">InvestmentsFinancing
TABLE OF CONTENTS <ul style="list-style-type: none">Table of Contents	COMPANY OUTLINE <ul style="list-style-type: none">Company ProfileGoals and ObjectivesKey Management ProfileTarget MarketService Area
EXECUTIVE SUMMARY <ul style="list-style-type: none">IntroductionStructureEmployee BackgroundsProductsMarket InformationCompetitive AnalysisMarketing Strategy	MARKETING PLAN <ul style="list-style-type: none">Marketing MixProduct DescriptionSWOT AnalysisPricing StrategyPromotional Strategy
	LOCATION <ul style="list-style-type: none">Location and Selling Location



Your business executed
the strategic way.

Ground Rules

By remembering to be confidential, this will help you and your group members create a relationship based on trust and honesty.

Listen to your trainer and group members feedback, while using the tools you have been given to fully evaluate the value of the feedback for your business.

Communication will be delivered with care. Creating space for others will only enhance our listening skills and make us better verbal communicators.



Business Functions

Structure for a business that works

Organizing your business with structure will help you grow in a way that doesn't consume you. This will become the blueprint you use to systemize the workflow, hiring, growth strategy and management.



What is your Plan?

Creating a Business Plan that is built off of your vision will ensure you create a plan that works for you.



Everything included, nothing left out

Your vision needs the form, direction, and clarity of a business plan to give it relevance to the day-to-day operation of your business. Your business plan is the link between the work of your business and the vision that work is intended to produce.



Business Plan

A business plan is a formal, written document that outlines the plan for achieving a vision with a time frame for specific milestones.

WESTCENTER.ORG/STARTUP-MENDO

What is A Business Plan:

A traditional plan is head centered, writing what you(or an investor) thinks you should do. A heart centered plan is lead by your vision; your goals, your timeline and your brand.

A plan that works is one that will look the same but used differently; actively checked in with and used to lead projects and initiatives.

Your plan will tolerate changes, actively encouraging development as you and the world guides you to do so.



Business Plan

Planning the 7 Business Functions

A business plan that works is heart centered; being driven by the vision the owner has. Keeping in mind that no plan is precise, your best predictions and knowledge being applied will be as much science and fact as art and perception.



Create a Framework that Accommodates Change

A plan that is too full or aggressive generally doesn't work. Create space for the unknown and if you find yourself moving faster, reassess how much more you want to do or not.



Organize What you Know, What you Don't and Who Can Help

Don't hold yourself back by what you don't know. Organize the areas you don't know first, so you can find the help you need as you document the things you do. In the end there are never exacts in business.

Detailed Planning

- Make it easy. It doesn't have to be hard. Use what you've already got. Build on it. Include the elements that make the most sense for your business. Don't load it up unnecessarily for the sake of volume.
- It would adapt easily to change. It would have a clear purpose and be appropriate for the result it's intended to produce. It would be balanced in terms of how it addresses the different areas of the business. It would have a clear monitoring and follow-up mechanism. And it would have "energy" and reflect the passion you feel for your business.
- Use common sense. Don't be swayed by any "logic" and don't include any "plan" that doesn't make sense to you. Can you see that the business plan that always works only works because of you?

Activity: Review Business Plan Contents Checklist: What do you got, what don't you got, what do you need to discover?

Take notes on the Business Plan Contents Checklist

WESTCENTER.ORG/STARTUP-MENDO



Organize.Implement

Quantify your efforts in a habitual way, recalibrate if needed. Look at your year in four quarterly chunks or 90-day increments. Through running a variance report(Key Strategic Indicators) of what you have done and haven't, you can make changes to your plan in a strategic way.

Organize Quarters:

Business Plan Content Checklist

Identify Monthly Actions:

Monthly Calendar Management

Schedule Weekly Tasks:

Task Management

The image displays four identical quarterly planning templates arranged in a 2x2 grid, separated by red lines. Each template is labeled with a quarter (Q1, Q2, Q3, Q4) in red text at the top. The templates are designed for planning and tracking tasks over a 90-day period. Each template consists of a calendar grid with columns for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and rows for weeks. To the right of the calendar grid is a section labeled 'Notes' for additional information. The templates are intended for use in a business plan or project management context.

Business Development Work

- ✓ Three Year Vision
- ✓ Business Plan Checklist Documented and Organized
- ✓ Quarterly Work Plan



THANK YOU FOR BEING PART OF



StartUp Mendocino

BUSINESS ACCELERATOR

2023



[WESTCENTER.ORG/STARTUP-MENDO](https://westcenter.org/startup-mendo)