

**PROFORMA**  
**“BUSINESS PLAN”**

**1. WHAT IS YOUR BUSINESS? (VISION STATEMENT)**

State how you see your business or what you want it to be

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**2. WHAT PRODUCTS OR SERVICES DO YOU PROPOSE TO OFFER?**

Write in detail what the products or services are that you intend to be able to sell

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**3. WHAT MARKETS DO YOU PROPOSE TO SELL INTO?**

List the different markets that you propose to sell into. (Geographic, Price, Clientele, etc.)

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**4. S.W.O.T**

List the **Strengths** of your business .....

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List the **Weaknesses** your business may have, i.e. skills or equipment that you may not have yet

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List the **Opportunities** your business has through the various skills or equipment you may have

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List the **Threats** to your business .....

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**5. COMPETITION**

List who your competitors are in the various markets and as part of that, detail their relative strengths and weaknesses, as this may help you to target which products to sell where.

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**6. MARKETING**

Briefly detail how you propose to let the different markets (3) know of your products (2).

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**7. PERSONNEL**

Detail the staff you have or will need. Detail their duties. Do they have the skills to perform their duties? What skills need to be acquired? Employment Agreements.

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**8. FINANCIALS**

a) Budget - Cash Flow. Detail capital requirements required for initial setup and initial operating period until established.

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b) Funding - Savings, loans, leases

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*If in doubt please discuss this with us before you commit yourself.*

**9. INSURANCES**

Detail the insurances you may need for your business eg. Public Liability, Professional Indemnity, Product Liability, Fire and Theft on Shop, Plant, Motor vehicles, Life or Death Cover to protect any mortgagees you may have, Sickness and Accident Insurance, Trauma Insurance. We can assist you with these.

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**10. FINANCIAL STRUCTURE / RECORDS**

a) Have you determined the most appropriate Financial structure for your business eg Sole Trader, Partnership, Trust, Company or a mixture. If in doubt please discuss with us.

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b) Do you know what records you need to keep? What registrations are required?  
Do you require a legal agreement with Partners, Suppliers, Businesses, etc?

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**11. PERSONAL FACTORS**

How will your plan impact on your family? Do they support you? Do you need to update your Will and Enduring Power of Attorney to include your business? Do you have a current Will and Power of Attorney?

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**12. REFERRALS**

Do you have all the contacts you need? eg. Solicitors, Finance, Real Estate, Insurance etc. If not please ask as we may be able to refer you to a suitable source.

***“SMALL BUSINESSES DO NOT PLAN TO FAIL”  
THEY MERELY FAIL TO PLAN!”***