

## **Planning Workshop Action Guide**

Why have a Business Plan?

Why have a Strategic Plan?

### **Key Elements of a Business Plan**

#### **Executive Summary**

A compelling overview of the business concept, what you expect to accomplish, a list of your products and services, why you are starting the company, and details about your experience in this industry.

#### **Company Description**

A description about the company and why it's different than what other companies offer.

#### **Market Analysis**

A statement defining what you know about the industry you are entering along with trends in this industry, who you are targeting with your products and services, and why people need what you offer.

#### **Competitive Analysis**

Describe the alternatives for your product or service or what happens without your offerings. Be sure to show that there is a need for what you offer.

#### **Company Leadership**

Your skills, experience, and qualifications to run the enterprise along with the teams you have put in place.

#### **Your Offerings (products, services, events, etc.)**

Define what you offer in detail and the demand for those offerings. You should define how you will deliver the offerings and if you depend on others (technology, supply chain, etc.). List what it takes to create the products or host the events and how price is determined along with the costs of production.

#### **Marketing Plan/Fundraising Plan**

Define how you will acquaint your potential purchasers about your product and the budget needed to promote your brand. Include the price for branding as well.

#### **Sales Strategy/Funding Strategy**

Define how the products, events, or services will be sold – cost for sales force and how the sales process will work.

#### **Request and Use of Funds**

Identify specifically how much capital you are raising and how those funds will be used.

#### **Financial Projections**

Define financial goals based on research for the first 12 months in detail and the following 5 years in summary.

## Key Elements of a Strategic Plan (an operational document)

All the elements of the Business Plan

Plus

### The Problem (the WHY)

What existing challenges (pains, aspirations) does your organization propose to solve that certain marketplace segments are motivated enough to want to invest in solving?

### The Solution (the What)

What is the end result/benefit that the organization's resource provides to those with the challenges listed in the "Problem" section above?

### The Unique Value Proposition (the How)

A statement that *irresistibly* describes the most *compelling benefits* your market clients have *taught* you they receive from the organization's product/service/brand that are *distinctively different* from other products/services your market uses to *try* to resolve their *pain points* &/or achieve their *aspirations*.

### The Impact Details

Identify the specific details on how your work will improve people's lives in quantifiable terms.

### Long-Term Objectives and Short-Term Goals

What does the organization look like at the end of 3-5 years in terms in three or more measurement areas: 1) Financial; 2) Products or Services; and 3) Organizational systems, staff, facilities, etc. The short-term goals should set milestones for the first year of the journey to accomplish the long-term objectives.

### Action Plan for Each Goal

Define the specific actions to accomplish each short-term goal with 30-day milestones.

### Committee Goals and Action Plans

Define the project teams, committees, or work teams that will champion the goals of the organization.

### Fundraising Strategy for 8 Different Streams

Define how the organization will generate capital from up to 8 different sources with target funding from philanthropists, grant makers, sponsors, events, product sales, and planned giving.

### Leadership Team

List the names of board members, staff, and volunteers with their experience, and qualifications. This is key to a funder gaining trust that you can accomplish your targeted impact.

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