

[DATE]

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Zhauns Business Opportunity Machines (Pty) Ltd. (Zhuans) provides this business plan template to guide you through the development of your company's business plan. This template serves as a document to guide you in your development of a business plan.

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[COMPANY NAME BUSINESS  
PLAN TEMPLATE  
[DOCUMENT SUBTITLE]

NAME OF BUSINESS  
CONTACT NUMBER & EMAIL  
[Company address]

## Getting started on your Business Plan

Please read cover page before proceeding to complete the business plan template.

The purpose of this business plan is to take all the key considerations of your business and put it into a single neat document. Whether you're a new or an established business.

While all business plans share the common objective of describing a businesses purpose and structure, analysing the marketplace, and creating cash flow projections, the depth and breadth of the information required may vary according to your needs. In developing your business plan you may need to think carefully for whom the plan is being developed and provide the information they are looking for and, you will need to regularly revise and update the plan to keep it current. The main reasons for a business plan are:

- **Proof of Idea:** You may have started your business and just need to get all the details on paper so you can start to really understand whether you have a good business model.
- **Bank Loan Application:** You may need a formal business plan to give to your bank as part of your business loan application.
- **Investors/ Funders Proposal:** You may be seeking funding from investors, venture capitalists or government departments and agencies.
- **Strategic reasons:** You may want a roadmap for growing and managing your business.

There are 3 basic elements of the business plan:

1. The business concept - a description of your business, its market, its products, and its staff/team structure and management.
2. The market analysis – your business will operate within a particular marketplace, so it is important to understand customer demographics, preferences, needs, buying behaviour, and your competition.
3. The financial analysis - if your business is new, this will include projected cash flows, capital expenditures, and the balance sheet. As well as a forecast as to when the business will break-even.

Should you lack the knowledge to complete the business plan or section of it like the financial information, we advise that you enlist the help of a business consultant or financial advisor.

Writing a business plan is an opportunity to think through every aspect of your business. A good business plan is clear and concise. And, keep in mind when writing your business plan that it needs to be simple to understand, a person who has no experience with your product or should be able to understand it.

We wish the very best in getting started on your business plan. Good Luck!

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## 1. Executive Summary

[Summarise the most important aspects of the business plan]

*The Executive Summary is the most important part of your business plan. Often, it's the only part that a prospective investor or lender reads before deciding whether or not to read the rest of your plan. It should convey your enthusiasm for your business idea and get readers excited about the product or service you are offering.*

*We advise that you write your Executive Summary last, after you have completed the rest of the business plan. In that way you will have thought through all the elements of your business and can summarise.*

*The Executive Summary should briefly explain each of the below. An overview of your business idea (one or two sentences).*

- *A description of your product and/or service. What problems are you solving for your target customers?*
- *Your goals for the business. Where do you expect the business to be in one year, three years, five years?*
- *Your proposed target market? Who are your ideal customers?*
- *Your competition and what differentiates your business from them. Who are you up against, and what unique selling proposition will help you succeed?*
- *Your management team and their prior experience. What do they bring to the table that will give your business a competitive edge?*
- *Financial outlook for the business. If you're using the business plan for financing purposes, explain exactly how much money you want, how you will use it, and how that will make your business more profitable.*

*Limit your Executive Summary to one or two pages in total.*

*After reading the Executive Summary, readers should have a basic understanding of your business, excited about its potential, and interested enough to read further.*

## 2. Company Business Description

[This summary section highlights your company successes (if you're already in business) or why it will be successful (if you're a start-up). Provide facts about the business such as location, owners, hours, products, and services.]

- *When did the business or when do you plan to start the business?*
- *What does the company or business do?*
- *Provide a comprehensive list of current products that are offered or will be offered?*
- *What does the company own? Are their core assets and resources that the company owns to help it do business?*
- *What industry or market does the company work in?*
- *Where does the company operate from? Describe location or premises*
- *With who do you do business?*
- *Who manages and runs the business?*

See appendix A for Compliance and contact information and see Appendix C for additional business information you can share.

## 3. Market Analysis/ Review

[The purpose of this section is explore and demonstrate knowledge of the market your business is operating within. It focusses on the customers who are most likely to purchase your products or services.]

*Describe the groups of customers based on demographics, such as age, income, location, and buying habits.*

*If you'll be operating business-to-business (B2B), use characteristics to describe the ideal businesses to which you'll be selling.*

*Make sure to include information on your immediate competitors. List your main competitors strengths and weaknesses and the potential impact on your business. This section outlines how your business will gain a foothold in the market share by taking advantage of your competitor's weaknesses.*

## 4. Team

[In this section, make the case why you and your team have the experience and knowledge to make this business a success.]

- *A list the founders and key staff members*
- *A description of who will manage the business on a day-to-day basis. What experience do these individuals bring to the business? What special or distinctive competencies do they offer?*
- *Provide an organisational chart if you have more than 10 employees, showing the management hierarchy and responsibility for key functions. See example below.*

## 5. Products (and Services)

[This section expands on the basic information about your products and services included in the Executive Summary and Company Description.]

Here are some points to consider:

**1. Your company's products:**

*What do you sell, and how is it manufactured or provided? Include details of relationships with suppliers, manufacturers and/or partners that are essential to delivering the product or service to customers.*

**2. The problem the product solves:**

*Every business needs to solve a problem that its customers face. Explain what the problem is and how your product or service solves it. What are its benefits, features and unique selling proposition? Yours won't be the only solution (every business has competitors), but you need to explain why your solution is better than the others, targets a customer base your competitors are ignoring, or has some other characteristic that gives it a competitive edge.*

**3. Any proprietary features that give you a competitive advantage:**

*Do you have a patent on your product or a patent pending? Do you have exclusive agreements with suppliers or vendors to sell a product or service that none of your competitors sell? Do you have the license for a product, technology or service that's in high demand and/or short supply?*

**4. How you will price your product or service:**

*Describe the pricing, fee, subscription or leasing structure of your product or service. How does your product or service fit into the competitive landscape in terms of pricing—are you on the low end, mid-range or high end? How will that pricing strategy help you attract customers? What is your projected profit margin?*

## 6. Sales and Marketing Strategy

[In this section, explain how you intend to make sales in the market, grow sales, communicate with customers, and distribute your products. Be clear in defining your sales strategy.]

- *Will you use sales representatives, billboard advertising, pamphlet distribution, social media marketing, or all of the above?*
- *How the business will succeed in the market? How will you create a unique and valuable position, involving a different set of activities?*
- *What is unique about the business? How is the offering different from that of competitors?*
- *What is the value for the customers? Describe the value proposition for the customer?*

## 7. Financial Plan

[The financial data and analysis section is the most difficult part of a business plan and often the longest to complete. This section requires you to forecast income and expenses for the next three years. Additionally, it requires a working knowledge of common financial statements, like the profit and loss statement, balance sheet, and cash flow statement.]

- *Start-up expenses: a description and explanation of what it will cost to launch the business and where you expect to get this money*
- *12-month profit and loss projection (month-by-month) (and a three-year profit and loss projection (quarter-by-quarter))*
- *A 12-month cash-flow projection and a three-year cash-flow projection (quarter-by-quarter)*
- *A projected balance sheet at start-up and at the end of years one to three*
- *A break-even calculation*
- *A breakdown of staff salaries and wages*

To help you complete the above requirements you can access some free Business Planning & Financial Statements Templates [here](#).

## 9. Appendix

[In this section, include supporting information like financial statements, credit reports, business registration document or permits, legal documents and contracts (to demonstrate to investors that revenue forecasts are secured by concrete business relationships), and bios/resumes for key personnel.]

Included in this template are:

APPENDIX A – Compliance and Contact Information

APPENDIX B – Ownership Information

APPENDIX C – Additional Business Description Information

Additional document that could be included:

- B-BBEE Certificate / Sworn Affidavit
- Detailed lists of equipment owned or to be purchased
- Brochures and advertising materials
- Maps and photos of location
- Newspaper or other articles
- Copies of leases and contracts
- Letters of support from future customers
- Any other materials needed to support the assumptions in this plan
- Market research studies
- List of assets available as collateral for a loan
- Detailed financial calculations and projections
- Company Profile
- Blueprints and plans



## APPENDIX A

## Compliance and Contact Information

<b>Company Name:</b>	
<b>Legal entity type:</b> [e.g. (Pty) Ltd., or CC.]	
<b>Company Registration number:</b>	
<b>Bank Details:</b> [Name of Bank; Branch Code; Type of Account]	
<b>SARS Income Tax Number:</b>	
<b>VAT Number:</b> (If applicable)	
<b>B-BBEE Status:</b> [Include B-BBEE certificate in Appendix and include Level]	
<b>Website Link:</b>	
<b>Main Contact Person:</b>	
<b>Contact Numbers:</b> (head office and cellular)	
<b>Email Address:</b> (Main contact, general or admin addresses)	
<b>Business Physical Address:</b>	
<b>Postal Address:</b>	
<b>Social Media Handles:</b> [LinkedIn; Facebook; Twitter; Instagram; etc.]	

## APPENDIX B

### Ownership

Details of owners and their respective shareholding percentages

<b>Shareholder</b>	<b>1</b>
Name and Surname:	
Age:	
Gender:	
ID Number:	
Percentage Shares:	
Other Contribution of Value: e.g. Managing Director	

<b>Shareholder</b>	<b>2</b>
Name and Surname:	
Age:	
Gender:	
ID Number:	
Percentage Shares:	
Other Contribution of Value: e.g. Operations Director	

## APPENDIX C

### (OPTIONAL – Additional Business Description information)

#### Mission statement

*A mission statement is a brief description of a company's fundamental purpose. It answers the question, "Why does your business exist?" In general, it's best to keep your mission statement to one or two sentences.*

#### Vision

*A vision statement describes where the company aspires to be upon achieving its mission*

#### Goals and objectives

*Include goals for each phase of the business and timeframes that needs to be complete at start-up and for growth.*

#### Strengths and core competencies

*Strengths are simply what the company is good at. Core competencies are the resources and/or strategic advantages of a business, including the combination of pooled knowledge and technical capacities, that allow it to be competitive in the marketplace.*

*A swot analysis may also be included. It's a useful technique for understanding your company's Strengths and Weaknesses and identifying both the Opportunities available and the Threats that may be faced.*

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Threats</b>
<i>What the company is good at. What's working. What do your customers like about you.</i>	<i>What needs to be fixed. What we needs to be strengthened. What the company wants to become more efficient at.</i>	<i>What the industry might soon want. What the company thinks you be good at. What will be our difference-maker.</i>	<i>What the company thinks could hinder growth. What/who you think could take your customers.</i>
<i>[Enter strengths here]</i>	<i>[Enter weaknesses here]</i>	<i>[Enter opportunities here]</i>	<i>[Enter threats here]</i>