



## BUSINESS PLANNING WORKBOOK



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This workbook is broken down into the following sections:

1. Executive Summary
2. Mission/Vision Statement
3. Your product or services
4. SWOT (strengths, weaknesses, opportunities, threats) Analysis
5. Your Markets
6. Customer Analysis
7. Competitive Analysis
8. Marketing Plan
9. Operations Plan
10. Management Team
11. Financial Plan

## **Executive Summary**

What does your business do?

What market need(s) does your company solve?

What are the 4-7 reasons why your company will be successful?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

**Company Mission**

**Company Vision**

## SWOT ANALYSIS



What are the **strengths** of your organization? (Name at least 5)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_



What are the **weaknesses** of your organization? (Name at least 5)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

What are the **opportunities** for your organization? (Name at least 5)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

8. \_\_\_\_\_



What are the potential **threats** for your organization? (Name at least 5)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

## Your Markets

What customer need(s) are you filling? What solution are you offering?

In what Markets do you compete?



What are the key market trends and how does that effect you?

How large is the relevant market – the number of customers/clients that can realistically buy from you? Explain.

What characteristics make your business uniquely qualified to succeed?

## **Customer Analysis**

What are the key needs of your target company?

Who are your target customers? Give a detailed demographic profile.

## **Competitive Analysis**

Who are your direct competitors? What are their strengths & weaknesses?

Who are your indirect competitors? What are their strengths & weaknesses?

A large, empty rectangular box with a double-line border, intended for the user to write their response to the question above.

What are your competitive advantages? Are these sustainable (can competitors emulate them)?

## **Marketing Plan**

What are your products and/or services?

How are you going to promote your company's products and/or services?

How will you sell your product and/or services to customers? Directly, distributors ect.

**Operations Plan**

What are the key milestones will you need to accomplish over the next 1-3 years in order to achieve success?

## **Management Team**

Who are the key members of your management team?

What positions do you still need to fill and/or create?



## **Financial Plan**

What are the ways in which you generate revenue?

What are your topline 5 year financial projections?



**PARKING LOT NOTES:**

Use this page for any questions or points that you'd like to discuss that are not addressed in any of the above sections.