

# *Simple Business Plan and Quick Marketing Plan*



# **SIMPLE BUSINESS PLAN**

# 12-Month “Simple” Business Plan

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The simplest business plan you’ll ever create. We focus on Revenue Profit and employees for this exercise, as these are the baseline numbers for most businesses. The figures for this exercise don’t have to be exact and precise, they just have to be reasonable.

## **Step 1. Goals—5 Years**

What are your financial Goals for the business in 5 years’ time?

If you haven’t thought this far forward, you don’t know your “destination”.

Without a destination, how can you know if you heading in the right direction?

## **Step 2. Goals—3 Years**

To be on track for your 5-year Goals, where do you need to be in 3 years?

## **Step 3. Goals—12 Months**

To be on track for your 3 (and 5-year) Goals, where do you need to be in 12 months’ time? Come up with a reasonable figure based on your ambitions and the best information currently available. You need to start being more specific as the time frame is much shorter.

## **Step 4. Goals—9 Months**

To achieve your 12-month Goals, where do you need to be by 9 months? Consider the impact of seasonality and “momentum” and all other factors known at this time.

## **Step 5. Goals—6 Months**

To achieve your 9-month Goals, where do you need to be by 6 months? This is the half way point. What is realistic and achievable and will keep you firmly on track for achieving your 9- month figures?

## **Step 6. Goals—Where are we now?**

To achieve your 6-month Goals, where do you need to be in 90 days’ time? Take into account all known factors known at this time. How you start is all-important, so stretch yourself while being realistic. These figures need to be quite specific and remember there is only so much you can do in 3 months?

## **Step 7. Goals—Where are we now?**

This will give you an indication of how reasonable your plan is. Don’t be put off by setting your goals too high in the long run, just be realistic in the short term. After all, if you aim for the stars and reach the moon then you have still made a major leap forward.

(Figures shown at step 6 will form the basis of activity for your first 90-day plan so check that the figures are achievable and focus on what needs to start RIGHT NOW, in order to keep you on track to achieve your short-term and longer-term financial goals)

Use the box at the end to put your assumptions in arriving at these figures, you will find this useful for future reference.

# 12-Month "Simple" Business Plan

	Revenue ZAR	Profit ZAR	Team #
<b>5 Years</b>			
<b>3 Years</b>			
<b>1 Year</b>			
<b>9 Months</b> Use annual figures			
<b>6 Months</b> Use annual figures			
<b>3 Months</b> Use annual figures			
<b>Now</b> Last 12 month's figures			

**Assumptions made:**

# MARKETING PLAN

# Outline

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## **Situation**—Where are we now?

- USP, Vision & Points of Culture
- Marketing in Use
- SWOT Analysis
- Resources

## **Objectives**—Where do we want to be?

- Targets, Aims & Objectives
- Strategy—How do we get there?
- Target Market

## **Tactics**—How exactly do we get there?

- Avenues Available
- Social Media

## **Action**—What is our plan?

- Your Plan

## **Control**—Did we get there?

- Review

## **Break Even Analysis**

## **Situation:** *USP, Vision, and Points of Culture*

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List all you can about your business—your unique selling point, mission statement, vision and points of culture.

**Unique Selling Point:**

**Mission Statement:**

**Vision:**

**Points of Culture:**



## **Situation:** *Marketing in Use*

List all the current marketing you carry out and record how successful you think it is, based on leads and conversions. Include any online methods and try to give as much detail as possible.

## **Situation:** *SWOT Analysis*

List all the strengths, opportunities, weaknesses and threats in your current marketplace.

## **Situation:** *Resources*

List your current resources—your team, facilities and any added input which may be useful when working on a marketing plan.

## **Objectives:** *Targets, Aims & Objectives*

List your company's targets, aims and objectives,  
both long term and short term.

**Targets:**

**Aims:**

**Objectives:**

## **Strategy:** *Target Market*

Describe your ideal customer in as much detail as possible, thinking about any specifics you can list.

## **Tactics:** *Avenues Available*

Look through the following list and see if any of these avenues are a possibility in your marketing. Also, add any additional avenues you can think of.

**Website**

**Pay-Per-Click**

**Blog**

**Shows/Exhibitions**

**Press Articles**

**Newsletter**

**Testimonials**

**Networking Events**

**Mail Shots**

**Telemarketing**

**Webinars**

**Paid Advertising**

**Open Days**

**Videos**

**Community Interest**

**Social Media**

## **Tactics:** *Social Media*

There are a range of different social media channels available but it's not usually necessary to be on them all. Pick those you feel are most appropriate for your business, and give a brief overview of the reasons.

**LinkedIn:**

**Google+:**

**YouTube:**

**Twitter:**

**Facebook:**

**Pinterest:**

**Instagram:**

## Action: *Your Plan*

Based on the information you have filled in throughout this document, list your actions going forward. You may prefer this in a chart or different format – whatever is best for you.

<b>Action 1:</b>	
<b>Responsibility:</b>	<b>Timeframe:</b>
<b>Target Customer:</b>	
<b>Further Detail:</b>	
<b>Aims:</b>	



**Action 2:**

**Responsibility:**

**Timeframe:**

**Target Customer:**

**Further Detail:**

**Aims:**

**Action 3:**

**Responsibility:**

**Timeframe:**

**Target Customer:**

**Further Detail:**

**Aims:**

<b>Action 4:</b>	
<b>Responsibility:</b>	<b>Timeframe:</b>
<b>Target Customer:</b>	
<b>Further Detail:</b>	
<b>Aims:</b>	

<b>Action 5:</b>	
<b>Responsibility:</b>	<b>Timeframe:</b>
<b>Target Customer:</b>	
<b>Further Detail:</b>	
<b>Aims:</b>	

<b>Action 6:</b>	
<b>Responsibility:</b>	<b>Timeframe:</b>
<b>Target Customer:</b>	
<b>Further Detail:</b>	
<b>Aims:</b>	

<b>Action 7:</b>	
<b>Responsibility:</b>	<b>Timeframe:</b>
<b>Target Customer:</b>	
<b>Further Detail:</b>	
<b>Aims:</b>	

<b>Action 8:</b>	
<b>Responsibility:</b>	<b>Timeframe:</b>
<b>Target Customer:</b>	
<b>Further Detail:</b>	
<b>Aims:</b>	

<b>Action 9:</b>	
<b>Responsibility:</b>	<b>Timeframe:</b>
<b>Target Customer:</b>	
<b>Further Detail:</b>	
<b>Aims:</b>	

## **Control:** *Review*

Review regularly how successful each strategy is – test and measure each aspect of the marketing plan and record the results.

# Break Even Analysis

It's essential that you work out your costs up front. Otherwise, you'll have no idea what you need to achieve in order for the campaign to be worthwhile. You may find out after doing the analysis that the campaign has so little chance of success, you need to go back to the drawing board altogether.

This analysis is for the whole campaign. After you've worked out your total fixed costs (for the campaign), you then work out your profit (your average rand sale minus your variable costs),

which gives you enough info to work out how many responses you need in order to break even.

Divide this number by the total number of letters you are planning to send out. This will give you a percentage response rate. As a very rough guide (every case is different), anything over 15% is stretching it. If you need that high a response, you might need to have another think about it.

The very best direct mail shots to cold, new lists get around 15% open rate. The best direct mail campaign to existing clients can be around 60%. These are rare results – if you need higher than that to break even, re-assess whether direct mail is the best way to go.



# Break Even Analysis

## E.g. Print Advertising

### Hard Costs:

Advertising	R _____
Envelopes	R _____
Paper	R _____
Printing	R _____
Postage	R _____
Other	R _____

**1. Total Fixed Costs:** R \_\_\_\_\_

**2. Average ZAR Sale:** R \_\_\_\_\_

### Variable Costs:

Telephone	R _____
Wages	R _____
Electricity	R _____
Rent	R _____
Brochures	R _____
Other Postage	R _____
Other	R _____

**3. Total Variables:** R \_\_\_\_\_

### Delivery Costs:

Costs of Goods Sold	R _____
Taxes	R _____
Transportation	R _____
Packaging	R _____
Other	R _____

**4. Total Delivery:** R \_\_\_\_\_

**5. Net Profit [2/(3+4)]:** R \_\_\_\_\_

**6. Response Needed to Break Even (1/5):** R \_\_\_\_\_