

Trilogy

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Workbook

Workbook

Trilogy

Getting Started



The Trilogy Template is a Microsoft Word document and includes the headings required with some brief notes and tips to help ensure that customers stay within the bounds of an appropriate business planning structure whilst giving them freedom to choose the format of information within individual sections. Customers may type directly into this document.

The Trilogy Workbook offers 50 pages of comprehensive notes, suggested headings, topics to include and/or suggested graphics per section. The Workbook encourages customers to structure the business plan to suit their business objective and guides customers in customising an appropriate business plan to meet their individual needs.

About the Trilogy Workbook

The idea is not to follow anyone's lead - but rather to use the BusinessPlans Trilogy Workbook to find your own way and create your own unique business plan that doesn't need to look like anyone else's.

There is nothing worse than 'making content up' just to fill in some heading in a template - that is the wrong approach. This is your unique business plan for your unique business so it needs to have individuality to it.

The BusinessPlans Trilogy Workbook has been written as a guide to completing a business plan. Its intention is to lead you through a business planning journey and let you decide what is important to your plan and what is not.

How do you determine what is important? Early on in the BusinessPlans Trilogy Workbook you are asked about the objective of your business plan. Always come back and remind yourself of the objective and consider the relevance of the information when deciding whether to include it in the business plan or not.

How to Proceed

You are the creator of this business plan and your mission is that at the end of this journey you will be able to speak to anyone with complete authority about every aspect of your business with confidence.

The BusinessPlans Trilogy Workbook is designed to provide a guide and notes around each section of the BusinessPlans Trilogy Template.

You are welcome to use the Trilogy Template and add content to this template to commence building your business plan. Each section in the BusinessPlans Trilogy Workbook corresponds to the BusinessPlans Trilogy Template for your convenience.

If you have the BusinessPlans Trilogy Workbook, you may decide to only use this workbook, start with a fresh page and as you read through the 50 page workbook, you decide what headings and subheadings work best for your unique business plan.

Writing Style

A word on style of writing in a business plan - be careful to consider the nature of your audience. Ask yourself what is their command of the English language and overall level of education.

You must match the style of writing and present it in a manner the audience will be comfortable with. The business plan will not meet its objective if the audience can't understand what you are trying to communicate.

Also, consider if you should get someone to check your business plan for grammar and spelling prior to showing your intended audience. A few misspelt words can seriously impact the integrity of a business plan.

Assume Nothing

One common error made in a business plan is where the writer assumes the reader understands or has some knowledge of their business, market or industry.

Assume the reader has no knowledge. If you can't decide if information is relevant or not, include some information in the business plan and include the bulk of any back up information as an Appendix.

Here we go...



Front Page

The table below appears in the Trilogy Template. Simply place your cursor in the boxes underneath each heading and complete it. Import a logo if you have one. Images do offer impact particularly on the front page, so if you don't have a logo at this stage, import an image that may reflect your industry or market.

<p>Business Name:</p> <input data-bbox="241 714 711 772" type="text"/> <p>ABN</p> <input data-bbox="241 863 711 921" type="text"/> <p>Address:</p> <input data-bbox="241 1005 711 1138" type="text"/>	<p>Business Logo if available</p> <p>(here)</p>
<p>Date the plan was completed</p> <input data-bbox="329 1711 797 1770" type="text"/>	<p>Contact Details</p> <p>Your Name</p> <input data-bbox="933 1402 1401 1461" type="text"/> <p>Phone Number</p> <input data-bbox="933 1535 1401 1593" type="text"/> <p>Email Address-</p> <input data-bbox="933 1675 1401 1734" type="text"/>

Executive Summary

The Executive Summary is completed at the end of the business planning exercise so skip this section and come back to it when you've completed each Book in the Trilogy Workbook.

If you've finished the Trilogy Workbook and you've come full circle back to this point, congratulations, you're almost finished your business plan.

The Executive Summary should offer the reader an overview or, as the name suggests, a summary, of the whole business plan.

The Executive Summary is positioned at the beginning of the plan. It should provide a concise overview of the business plan. Think of the four or five main points from each of Book 1, 2 and 3 and include these points in the Executive Summary. After reading the Executive Summary the reader should be able to understand where the business is going and the logic in taking that direction.

Take account of the reader or the general audience and make sure that after reading the Executive Summary, their appetite has been stirred to read the rest of your business plan.

It is helpful if the final line of the Executive Summary confirms the reason you have written the business plan so it is front of mind as the reader commences reading the plan. Often people note any funding need as the last line of the Executive Summary.

Suggested Points

Here are some suggested sentence starters for your Executive Summary. If you complete these sentences, you should have a well rounded Executive Summary.

This business plan is being written for (Business name) which commenced trading (date) / or is starting to trade (date)...

The proprietors of this business are (Proprietors name)...

The business sells/will sell (product /service name)...

The objective of this business plan is to (business plan objective)...

The key strengths of this business include (your strengths & business strengths)...

The key external factors that influence this business include (from Book 2)...

The mission statement for the business is...

My target market is (target market). This group of customers is representative of my targets because...

I have identified the following sales targets for year 1...

My cash flow projections indicate a cash surplus/deficit of \$(amount) in year 1 and (if deficit) I intend to fund this deficit by (bank loan/ equity funding / other).

Business Plan Objective

The objective of a business plan needs to be explained in the first instance. It actually guides you as the writer and helps keep you on course. In addition, it allows the reader to identify what you're trying to achieve very early on and starts them thinking about your objective as they read through the plan.

Suggested objectives to include in Trilogy Workbook:

- To help start my business
- To help structure and clarify my thoughts
- To accompany an application for a business loan for \$_____
- To show investors or shareholders
- To show my family and friends
- To show a supplier
- To show a government agency

Book 1



Business Plans

Trilogy

You & Your Business

Proprietor Background

...About You

You and your business are the central characters in this Trilogy so your background is extremely important. You don't need to have a rocket science background to impress everyone but you do need to think broadly about your personal and career background and give a good summary of your skill set.

For example, if you're looking at starting a retail business in fashion, any retail experience from your past should be highlighted in addition to any fashion interest you've demonstrated, even if it relates to non business activities.

If you've taken a career break to start or raise a family, travel, or for any other reason, think about the skills you've developed even during these times - skills are skills. Don't discount any of them - write about them.

Don't mention the business in this section - that is coming up next. This section is purely about your background.

Including a resume as an Appendix is a great idea so the reader can refer to your background in detail if they chose to.

Points to Cover

- Your professional background
- Personal traits
- Why do you want to start the business
- Time / days per week commitment to the business
- Include resume as Appendix

Suggested Headings

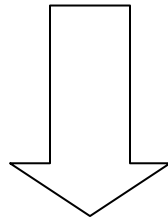
- Proprietor Background
- About Me
- My Background

Business Profile

...If you're starting a new business this section is for you.

...If you're running an established business go to the next section.

...My Proposed Business



The BusinessPlans Trilogy Workbook
Continues to page 50 where

the winner is ...



YOU!



plan2profit

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