**5-Year Business Plan**

<date> - <date>

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**Document version history**

| Date | Version | Description of changes |
| --- | --- | --- |
|  | 0.1 |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Executive Summary

This document aims to provide detailed overview of our business, including what we do, where we plan to be in the next 5 years and how we plan to get there.

Key points raised in this document are described in this section.

<Briefly summarize the most important points of this plan here>

# Company Description

## Company Overview

<Briefly describe your business. In a nutshell, describe, what do we have going for us? What makes us competitive? Who are we marketing to?>

## Mission Statement

<Talk about your reason for being, your guiding principles, etc.>

## Industry Briefing

## Corporate History

## Legal Structure

<e.g. sole trader, partnership, company, trust, etc. Include relevant business numbers and dates of incorporation>

# 5-Year Goals

The high-level strategic goals for the next 5 years are:

| No. | Goal |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| 7 |  |
| 8 |  |
| 9 |  |
| 10 |  |

To meet our goals we plan to meet the following milestones each quarter:

| Quarter | Milestones |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| 7 |  |
| 8 |  |
| 9 |  |
| 10 |  |
| 11 |  |
| 12 |  |
| 13 |  |
| 14 |  |
| 15 |  |
| 16 |  |
| 17 |  |
| 18 |  |
| 19 |  |
| 20 |  |

# Products and Services

## Description

## Research and Development

## Pricing

## Delivery

## Production

## Marketing and Sales

### Market Definition

### Customer Profile

### Competitive Analysis

### SWOT Analysis

### Sales and Promotion

# Operations

## Legal and Government Issues

<What permits licenses will you need to meet? What legislation impacts you?>

## Staffing

## Suppliers

## Alliances

## Policies

## Risk Assessment

## Facilities

## Location

## Insurance

# Management

## Business Areas

This section lists each of the main business areas and provides a brief description of the role and responsibilities of each.

| Business Area | Role and Responsibilities |
| --- | --- |
| Executive Office | Role:  Responsible for: |
| Sales and Marketing | Role:  Responsible for: |
| Operations | Role:  Responsible for: |
| Admin and Finance | Role:  Responsible for: |

## Organisational Chart

<This is a sample org chart for a small organisation. Some of the staff listed are off-site contractors.>

## Key Job Descriptions

## Advisors

<This section should list any external advisors you are of plan to use. For example, Lawyers, Accountants, Mentors, etc.>

# Financials

## Profit and Loss

## Cash Flow

## Balance Sheet

## Financing

## Debt Schedule

## Use of Funds and Assumptions

## Break-Even Analysis

## Establishment Costs

Appendix

<The Appendix should include any supporting documentation that is relevant to your plan. What is included here really depends on what you are using your business plan for. For example, if you are giving it to a bank to seek a loan, you will need a lot of detail in the appendix. If the plan is just for you, you probably don’t need very much here.>

Legal Documents

Market Studies

Resumes

Customer Testimonials

Photographs and Maps

Distributer/Supplier Lists

Articles

Owner’s Personal Financial Statements

Tax Statements

Advertising Materials and Brochures

Credit Reports

Character References

Equipment List

Glossary

Reference Section/Bibliography