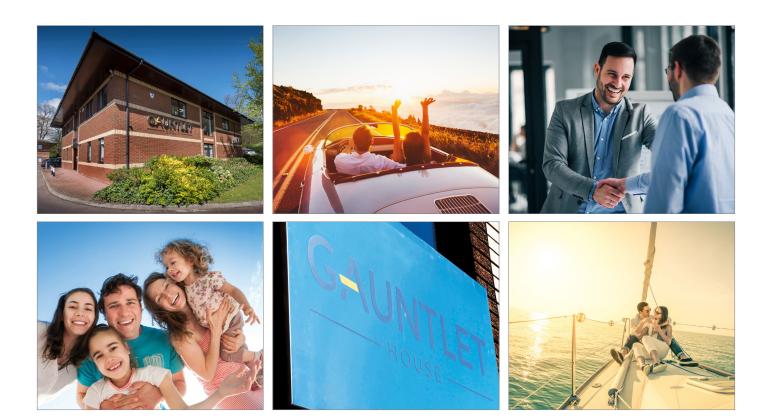


## APPOINTED REPRESENTATIVE

## **Business Plan**





Company name:

Completed by:

Date completed:

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## **MISSION STATEMENT**

**SET OUT YOUR MISSION FOR YOUR BUSINESS.** As an example:

"Our mission is to exceed our client's expectations by delivering independent advice that makes a real difference to our client's business through a culture that stimulates creative thinking by our staff and builds long term relationships with our customers and suppliers."

## **TARGET CLIENT DEFINITION**

#### **CREATE A DEFINITION FOR YOUR TARGET CLIENT BASE.**

This should show the size of the businesses that you are targeting, their trade, location and any other variable that could be used to define the business.





## **PROMOTIONAL AND LEAD GENERATION ACTIVITY**

# How will you generate new business enquiries for you target clients?

#### **USE THE FOLLOWING HEADINGS WHERE APPROPRIATE:**

Internet / website Advertising Trade shows Newsletters / email bulletins Mail-shots Telesales Introducers Networking Promotional literature

### **COMPETITOR ANALYSIS**

Who are your competitors and what are their strengths and weaknesses?

### **SWOT ANALYSIS**

Create a list for each of the following headings relating to you / your business:

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS





## **BUSINESS OBJECTIVES**

## Set out your objectives indicating what you aim to achieve in the following time frames

(e.g. create a database of potential customers, set up introducer agreements with two firms of accountants, join two networking groups)

#### SHORT TERM (IMMEDIATE ACTION, 1-12 MONTHS) MEDIUM TERM (1 – 3 YEARS) LONG TERM (3 – 5 YEARS)

## **ACTION PLAN**

ACTION	<b>OBJECTIVE</b> (What the business will see as a result of the action)	TARGET COMPLETION DATE

