

# APPOINTED REPRESENTATIVE

## Business Plan



Company name:

Completed by:

Date completed:

## INDEX

### PAGE

Mission statement .....	3
Target client definition .....	3
Promotional activity/lead generation activity .....	4
Competitor analysis .....	4
SWOT analysis .....	4
Business objectives .....	5
Action Plan .....	5

## **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

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