

Business Plan

Operating Plan

As the name indicates this is how you plan to run your business. You need to know some very specific details about your business in order to complete this part of the business plan.

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Plan Basics

What is the product or service you provide? _____

What is your expected growth now and in the near future? _____

Who and what are the management responsibilities for you and your management team? _____

How do you get your product or service into the hands of your client? _____

What do you use to create your product or service? _____

What software systems do you utilize to deliver your product or service? _____



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What technology do you use for day to day operations? _____

The following is optional Information. Fill these out as accurately as possible, if needed.

Location

What is the address of your business? _____

Do you own, rent or share your address? _____

What size of place do you need? _____

What features about the location do you need? _____

Does this location allow for growth? _____

Do you need special tools or equipment for your operation? If so, what is it? _____

Order Fulfillment

How do you deliver your product or service to the client? _____

What software or apps do you need to deliver your service? _____

How do you keep track of your customers for repeat sales? _____



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How do you communicate with your customers? _____

How do you manage sales data? _____

Payment Collection

What forms of payment do you take? _____

If you take credit cards, how do they pay? _____

How do you insure their payment is secure? _____

Do you have different pricing plans or discounts if they buy a lot from you? _____

Do you offer installment plans? If so, what is that structure? _____

Do you offer loyalty discounts? _____

Do you offer monthly payment service? _____



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Technology

Do you need local hardware for the operation of your business (e.g., credit card processor)? _____

Do you use mobile phone apps, if so which ones? _____

Do you need the use of computer software (e.g., CRMs)? _____

Do you use the cloud to store data? Yes / No

How do you ensure your data is secure? _____

How often do you backup your data? _____

What do you use to backup the data? _____

What other technology does your business require? _____



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Loyal Customers

Do you give repeat customers discounts, if so, what kind of discount? _____

Do you use any type of affiliate marketing system? _____

Do you have a referral program when a customer sends a new client your way? _____

Employee Skillset

How many employees do you need to start or maintain your current level of operation? What positions do they hold? _____

How many new employees will you need (and what positions) in order for you to grow? _____

