[*Organization Logo*]

Congratulations on committing to the long-term success of your business!

To build upon that commitment, [Organization Name] is providing you with this individualized Business Development Action Plan. This is a working document that outlines attainable objectives and specific tasks to address your overall business goals, informed by your conversations with our program staff. As you work towards the objectives in this plan, you will continue to develop your business skills and resiliency.

Please remember that our team is here to help you, every step of the way. Good luck!

Business Development Action Plan

[Client Name]

prepared by [Staff name], [Staff position]

2014

**Client Description:**

**Client Name:** [Client Name]

**Business Name:** [Business Name]

**Intake Date:** 11/18/14

**Project Overview:**

* Primary Goal: Sell at least 500 shirts to make the business cash flow positive by January 31, 2015.
* Key Objectives:
1. Complete business plan and financial projections
2. Complete business registration and form entity
3. Build credit; lay foundation for future loans
4. Enhance management skills & processes
5. Boost sales by approx. 50%

{the following is a sample, fictionalized client story}

[Client] sells screen-printed tee-shirts using nontoxic, water-based ink, tags printed by a local Bay Area company and cotton made in the U.S.A. The company sells shirts wholesale to local retailers, as well as several retailers outside of the Bay Area. [Client] also offers online sales through Etsy and direct-to-consumer sales at local craft fairs. [Client]’s target customers are primarily men between the ages of 18-55 with at least $45,000 in annual income. [Client] social media profiles on Twitter and Facebook.

[Client] is a financially-savvy artist who began selling shirts in 2012 as merchandise a friend’s band performances, only to realize that the shirts were outselling the friend’s CDs. [Client] began working full-time on the screen-printing business as of August 2013.

[Client] previously started a business planning course at City College but did not complete it. [Client] is currently taking advantage of Etsy Seller Seminars focused on marketing.

[Client]’s personal expenses have gone up in the wake of medical emergencies. Currently [Client] is cash flow negative and cannot fully pay rent using business income alone. Based on monthly personal budget needs (approx. $3,000) [Client] has calculated her breakeven point at: 500 shirts. So far [Client] has sold approx. 200-300 shirts.

The primary challenge now is that demand has outpaced supply; [Client] needs approximately $1500 to place a larger order for raw materials. Lack of credit has been an obstacle preventing access to business loans. While [Client] has a Seller’s Permit but has not done much else to formally register the business.

Going forward [Client] aims to launch a line of children’s shirts and develop e-commerce capabilities.

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| **Business Objectives**  | **Client** **Activities** | **Task** **Checklist**  | **Time Frame** | **Est.****Cost** | **Resources** **& Links (if applicable)**  |
| 1. Complete business plan and financial projections
 | * Fine-tune business model mechanics
 | * Complete Business Model Canvas brainstorm
 | 1-2 weeks | Free | <http://www.businessmodelgeneration.com/downloads/business_model_canvas_poster.pdf> |
| * Use Centro Business Planning Tool to create basic b-plan
 | * Complete 25 sequential planning activities
 | 1-3 weeks | Free | <https://itunes.apple.com/us/app/centro-business-planning-tool/id844160703?mt=8>  |
| * Seek out free business coaching
 | 4+ weeks | Free | SF LGBT Community Center <http://www.sfcenter.org/> |
| * Enhance market strategy section of business plan draft
 | * Draw from SCORE’s template to enhance plan
 | 3-8 weeks | Free | SCORE – volunteer corps of business mentors <http://www.score.org/resources/business-plan-template-startup-business> |
| * Create detailed financial projections for next 12 months
 | * Work with advisors to generate budget, P&L, Cash Flow & Balance Sheet
 | 6-10 weeks | Free | Classes and workshops available at Renaissance Entrepreneurship Center in SOMA <http://www.rencenter.org/> |
| 1. Complete business registration and form entity
 | * Register business with SF Treasurer
 | * File for local Business Registration Certificate
 | 2-3 weeks | $76  | City and County of SF: Office of Small Business <http://businessportal.sfgov.org/> |
| * Register Fictitious Business Name
 | * File FBN paperwork
* Advertise in periodical
* File proof of publication
 | 4-6 weeks | $60-80  |
| * Obtain Employer ID#
 | * Fill out online EIN form
 | 1-2 days | $20 | <https://sa.www4.irs.gov/modiein/individual/index.jsp> |
| * Form LLC
 | * Submit LLC forms
 | TBD | $70 | <http://www.sos.ca.gov/business/llc/forms/llc-1.pdf> |
| 1. Build credit; lay foundation for future loans
 | * Ascertain credit score
 | * Use free tool to check current credit score
 | 1-2 days | Free | <https://www.creditkarma.com/><http://www.creditsesame.com/> |
| * Join a Lending Circles microloan group
 | * Attend next LC Orientation
* Bring required docs to 1-on-1
* Attend Group Formation
 | 3-4 weeks | 0% interest; no fees | Mission Asset Fund<http://lendingcircles.org/> |
| 1. Enhance mgmt. skills & processes
 | * Establish Board of Advisors
 | * Recruit volunteer mentors from social networks
 | 6-10 weeks | Free | Pacific Community Ventures<http://businessadvising.org/> |
| 1. Boost sales by approx. 50%
 | * Develop your sales strategy & approach
 | * Watch and create plan based on “The 5 Step Sales Process” lecture
 | 4-8 weeks | Free | <https://www.youtube.com/watch?v=v4XWfWyOvE4> |

**Commitment**

Client and Program Staff agree to work together to pursue the goals and objectives outlined in this Individualized Business Development Plan. Client agrees to make a good faith effort to complete activities and tasks within the established timeframe. Program Staff agrees to provide all reasonable support and technical assistance necessary to help Client achieve their objectives.

**Client Commitment**

**Program Staff Commitment**

**Project Summary**

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| **Objectives** | **Outcomes** | **Results** |
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TBD

**Notes:**