



DATE

YOUR  
BUSINESS  
STRATEGY  
& PLAN  
TEMPLATE

YOUR LOGO HERE

PROPOSED TO

# WHAT THE PLAN WILL DO FOR YOU

- Get More customers
- Outperform Competitors
- Increase Clients & Profit
- Improve your productivity
- Grow faster - Take Leaps
- Use automation
- Significantly increase your business structure and value

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# THE ELEMENTS OF YOUR BUSINESS PLAN

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ELEVATOR  
PITCH

MISSION  
STATEMENT

SWOT  
ANALYSIS

GOALS SHORT &  
LONG TERM

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INDUSTRY  
ANALYSIS

MARKETING  
PLAN

AUTOMATION  
AND TEAM

FINANICAL  
PROJECTIONS



## EXECUTIVE SUMMARY

The executive summary should be only a page or two. In it, you may include your mission and vision statements, a brief sketch of your plans and goals, a quick look at your business, an outline of your strategy, and highlights of your client base and goals

## YOUR GOALS

- Ensure you grow month on month
- Have a Marketing Plan to fit your growth goals
- Serve your Clients well and for more than one event
- Plan new Opportunities and Product Launches

## YOUR VALUES

Explore both your own values to help you with decision making and your desired company values to share with potential clients. DM me if you would like a workbook for this or email: [Info@kaidi-coaching.com](mailto:Info@kaidi-coaching.com)

## YOUR VISION STATEMENT - ONE LINE

- IKEA. "Our vision is to create a better everyday life for many people." That's aspirational, short and to the point. ...
- Nike. "Bring inspiration and innovation to every athlete\* in the world. ...
- McDonald's. "To be the best quick service restaurant experience. ...
- Synergise - To help women reach their potential

## ELEVATOR PITCH - 1-2 MINUTE TO DESCRIBE WHAT YOU DO





## MISSION STATEMENT EXAMPLE

"To enable my clients to have a clear direction, focus and achieve quantifiable success in all areas of the business. For them to take ownership of their role, have job satisfaction and happiness, to prosper and be profitable while growing, learning and developing into the people and organisations they would like to be."

## TO CREATE

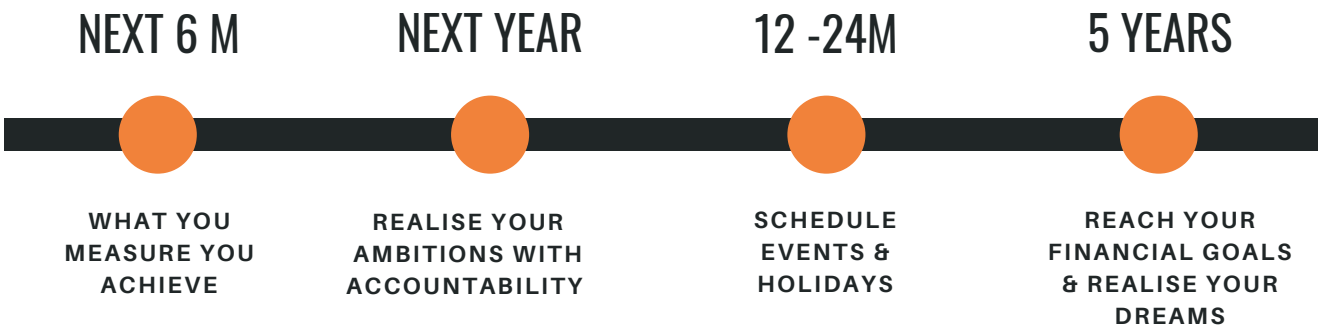
- Whom will you serve
- What do you want to do for them
- What will the benefits be for them
- Include any outcomes or results

## SWOT ANALYSIS

Google this for lots of help and ideas, then just create your own as below - being aware of your weaknesses will strengthen your plan. As will knowing and harnessing your strengths.

S W O T - ANALYSIS	
Strengths	Weaknesses
Opportunities	Threats

## SHORT AND LONG TERM GOALS

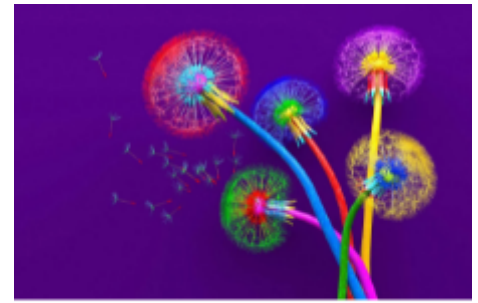




## INDUSTRY ANALYSIS

Google - Understanding Porter's Five Forces  
Harvard Business School professor Michael Porter created the tool to analyse an industry's attractiveness and likely profitability.

1. Competitive Rivalry. This looks at the number and strength of your competitors. How many rivals do you have? Who are they, and how does the quality of their products and services compare with yours?
2. Supplier Power. This is determined by how easy it is for your suppliers to increase their prices. How many potential suppliers do you have?
3. Buyer Power.
4. The threat of Substitution.
5. The threat of New Entry.



**Porter's Five Forces: Analyzing Competitiveness Using Porter's Five Force...**

Porter's Five Forces is a strategic tool you can use to assess your competitive position and identify ways to boost your profitability.

## MARKETING PLAN - ENSURE CUSTOMER KNOW, LIKE AND TRUST YOU

WHO DO YOU WANT TO SERVE  
- WHERE DO THEY HANG OUT?

WHAT DO YOU OFFER/SELL - GET CLEAR ON PRICING AND STRATEGY

BUILD COMMUNITY - START YOUR LIST

DEMONSTRATE YOU ARE A SUBJECT EXPERT  
BLOG, PODCAST, VLOG

YOUR TEAM-WHAT AUTOMATION IS NEEDED TO MAKE YOUR BUSINESS SMOOTHER? CALENDAR APP? VA'S OR WHAT STAFF DO YOU NEED - HOW BIG DO YOU WANT TO BECOME?



## FINANCIAL PROJECTIONS



- Costs - List all your set-up costs
- List ongoing costs remembering ink, paper, equipment hire, storage, platforms, Grammarly, canva, Quickbooks, accountant fees and more.
- List all your prices, packages, projected sales and total your anticipated income and various stages

TIPS Use a budget planner, download an excel sheet and remember what you measure you achieve

**I can help you create a more  
prosperous business.**  
**Would you please email me to arrange a chat  
at  
info@kaidi-coaching.com**

## **About Kaidi**

I'm **Kaidi**, Online Business Mentor, Leadership Coach & Trainer, Career Coach, Tara Mohr facilitator.

For over twenty years, I was an award-winning bank manager, sales coach, and trainer. I have put together this guide to help you refocus on your priorities and plan for success.

Before joining the bank, I had a varied Management career, starting as a Hotel Manager and Publican for several years, then transitioning into Event Management and Insurance Underwriting, Sales training and Call Centre Management. Finally, I trained with CTI to become a certified professional coach.

My unique mix of business experience and psychological insight, mindset coaching skills, and intuition means I have all the essential factors to help you succeed in business.



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id provides results.

I look forward to hearing from you.

