

IE

INTELLECTUAL EQUITY

Training and Consulting

Training • Business Plans and Consulting • Project Management • Facilitation

Business Plans

This is an in depth course: 2 full days, 6 hours each. Limited to 12 people per class.

It can be abbreviated into 2 half days; 4 hours each, over 2 days.

In this class you will learn the steps to creating a business plan, the components it must include, the elements that are vital to a financially successful business, where and how to research, where your market lies, and how to allow your passion to show through.

Business planning is an essential building block to ensuring the success of any business. It is also the primary tool to find investors. It is required if you go to the bank, and a guideline to operate by. It should tell your story in a well crafted and realistically positive way. Just walking through the process helps even the savvy business owner understand all facets of the business.

Business Plans have been developed and refined over the years and the format is something that should not be changed. Like a good recipe, a business plan needs to include certain ingredients to make it work. Those reviewing this type of document have expectations you must meet. If they do not see those crucial decision-making components, they'll see no reason to proceed with their review of your business plan, no matter how great your business idea. That being said, creativity is not lost in a business plan. It is simply defined in the scope and style.

We will walk through the steps, understanding the nuances and inclusions for each, and then work as a class through a sample plan ~ or in groups on your own.

CLASS OUTLINE:

Day 1 ~ We walk through each component discussing philosophy to gain conceptual understanding.

Day 2 ~ We apply our skills breaking down each component and creating a plan as a group or teams.

- **Business Plans:**
 - **Why they're important**
 - **Strategic Planning & Research**
 - **Organization & Management**
 - **Structure and org chart**
 - **Project Team**
 - **Financials**
 - **Budgets**
 - **Operating**
 - **Capital**
 - **Balance Sheet**
 - **Income Statement**
 - **Cash Flow Statement**
 - **Appendices:**
 - **Resume, Brochures, Supporting docs**
 - **Closing**
 - **Takeaways:**
 - **Business Plan Outline**
 - **Reference Book**
 - **Class Evaluation to share with Host Company**
- Over viewing:**
- **Executive Summary**
 - **Business Overview Section**
 - **Description and Vision**
 - **Opportunity**
 - **Philosophy/Idea**
 - **What you do and how you'll do it**
 - **Market Analysis**
 - **Definition of market**
 - **Competition: Your special place**
 - **Strategy and Timelines**
 - **Growth indicators**
 - **Products and Services**
 - **What**
 - **Pricing and Strategic Placement**

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