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Plans and Pitches

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Plans and Pitches

- **Fundamentals**
- **The Heart of the Plan**
- **Flesh and Bones**
- **Dressing and Growing**

5 Planning Fundamentals

1. **It's About Results**
2. **Form Follows Function**
3. **Planning is Management**
4. **Planning Manages Change**
5. **Planning Is Not Accounting**

Putting It Together

- You've done your plan in assignments
 - Overview and summary
 - Market analysis
 - Startup costs
 - Sales forecast
 - Profit and Loss
- Now pull it together
- Tell your story

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Action Plan: What? When?

Image source: Business Plan Pro

Milestones Make a Plan Real

Milestone	Start Date	End Date	Budget	Manager	Department
Corporate Identity	12/1/2011	12/17/2011	\$10,000	TJ	Marketing
Seminar implementation	1/1/2012	1/10/2012	\$1,000	IR	Sales
Business Plan Review	1/2/2012	1/11/2012	\$0	RJ	GM
Upgrade mailer	1/2/2012	1/17/2012	\$5,000	IR	Sales
New corporate brochure	1/2/2012	1/17/2012	\$5,000	TJ	Marketing
Delivery vans	1/1/2012	1/25/2012	\$12,500	SD	Service
Direct mail	2/2/2012	2/17/2012	\$3,500	IR	Marketing
Advertising	2/2/2012	2/17/2012	\$115,000	RJ	GM
X4 Prototype	2/1/2012	2/25/2012	\$2,500	SG	Product
Service revamp	2/1/2012	2/25/2012	\$2,500	SD	Product
6 presentations	2/2/2012	2/26/2012	\$0	IR	Sales
X4 Testing	3/1/2012	3/6/2012	\$1,000	SG	Product
3 Accounts	3/1/2012	3/17/2012	\$0	SD	Sales
L30 Prototype	3/1/2012	3/26/2012	\$2,500	PR	Product
Tech 12 Expo	4/1/2012	4/12/2012	\$15,000	TB	Marketing
VP S&M hired	6/1/2012	6/11/2012	\$1,000	JK	Sales
Mailing System	7/1/2012	7/25/2012	\$5,000	SD	Service
Totals			\$181,500		

Image source: Business Plan Pro

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Forecast Your Sales

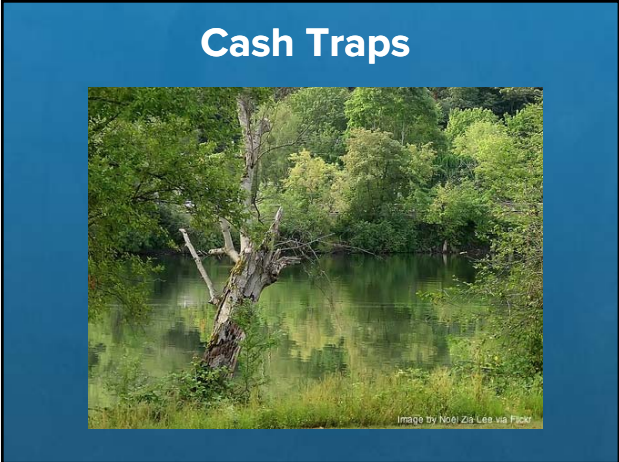


Expense Budget

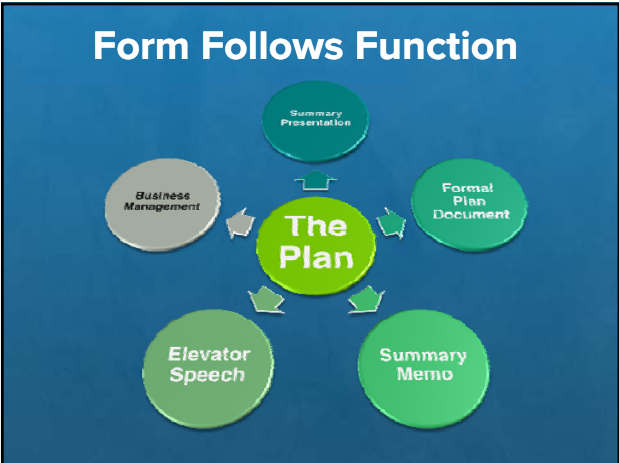
	Month 1	Month 2	Month 11	Month 12	Year 1
Expenses					
Payroll	\$12,000	\$12,000	\$27,250	\$27,250	\$194,750
Marketing/Promotion	\$13,500	\$13,500	\$13,500	\$13,500	\$142,000
Depreciation	\$0	\$0	\$0	\$0	\$0
Leases	\$500	\$500	\$500	\$500	\$6,000
Rent	\$1,500	\$1,500	\$1,500	\$1,500	\$18,000
Utilities	\$1,000	\$1,000	\$1,000	\$1,000	\$12,000
Insurance	\$300	\$300	\$300	\$300	\$3,600
Payroll Taxes	\$1,680	\$1,680	\$1,680	\$1,680	\$20,160
Other	\$0	\$100	\$0	\$0	\$600
Total Operating Expenses	\$30,480	\$30,580	\$45,730	\$45,730	\$417,110

Startup Plan

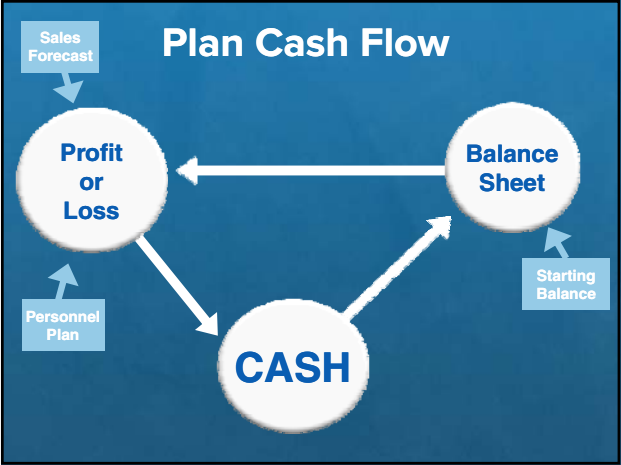
Start-up	
Requirements	
Start-up Expenses	
Legal	\$1,000
Stationery etc.	\$1,000
Remodeling & Construction	\$46,000
Marketing Collateral	\$8,000
Computer and Database Merchandise	\$13,000
Other	\$3,000
Total Start-up Expenses	\$72,000
Start-up Assets	
Cash Required	\$69,315
Start-up Inventory	\$25,282
Other Current Assets	\$0
Long-term Assets	\$0
Total Assets	\$94,597
Total Requirements	\$166,597

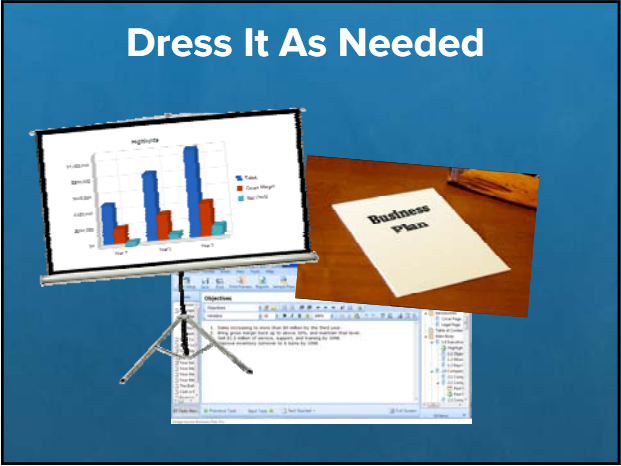


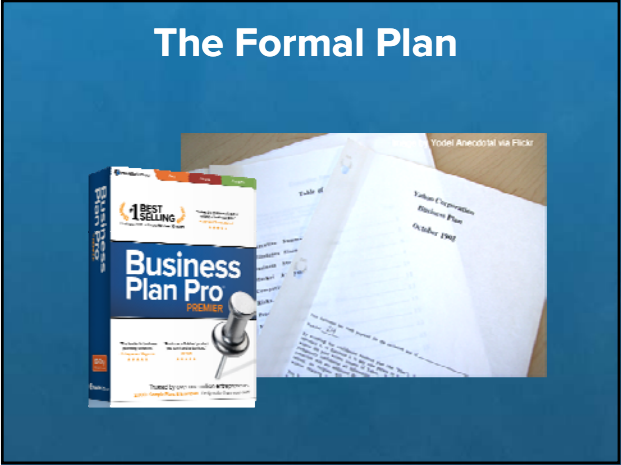


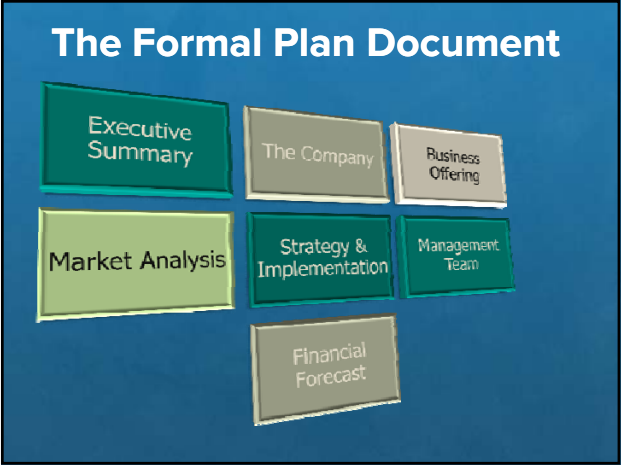


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Plan vs. Actual

Planned				Actual			
Unit Sales	779						
Meals	1,053			1,158			
Drinks	20			1,347			
Other	2,278			1,730			
Total Unit S							
Unit Prices	Jan	Feb	Mar	Jan	Feb	Mar	Mar
Meals	\$15.00			\$15.36			
Drinks	\$2.00			\$1.74			
Other	\$10.00			\$2.45			
Sales							
Meals	\$15,795			\$17,693			
Drinks	\$400			\$2,346			
Other	\$22,780			\$4,212			
Total Sales							
	\$18,175			\$24,251			
Variance							
Unit Sales				33	(140)	(55)	
Meals				(111)	(112)	138	
Drinks				47	36	101	
Other							
Total Unit Sales				(31)	(216)	184	
Unit Prices							
Meals				\$3.96	\$2.85	\$4.84	
Drinks				\$0.45	\$0.63	\$0.51	
Other				(\$2.51)	(\$1.59)	(\$0.89)	
Total Unit Sales							
				\$3,711	\$502	\$6,193	
Meals				(\$96)	\$37	\$730	
Drinks				\$302	\$271	\$902	
Other							
Total Sales							
				\$3,916	\$810	\$7,826	

Make it Happen

Next Steps
