

# Business Plan & Start-Up Workbook

A structured blueprint to turn your enterprise vision into a sustainable reality.

**Introduction:** This workbook has been professionally designed by Beyond CIC to help entrepreneurs, start-ups, freelancers, social enterprises, and aspiring business owners clarify goals, track financials, build actionable strategies, and structure proposals for funding acquisition.

## SECTION 1: BUSINESS INFORMATION

<b>Business Name</b>	
<b>Business Owner(s)</b>	
<b>Trading Address</b>	
<b>Email Address</b>	
<b>Telephone Number</b>	
<b>Website / Social Media</b>	
<b>Date Business Started</b>	

## BUSINESS STRUCTURE

<input type="checkbox"/> Sole Trader	<input type="checkbox"/> Limited Company	<input type="checkbox"/> Partnership
<input type="checkbox"/> Community Interest Co. (CIC)	<input type="checkbox"/> Charity	<input type="checkbox"/> Other

## **SECTION 2: EXECUTIVE SUMMARY**

**WHAT DOES YOUR BUSINESS DO?**

**WHAT CORE PROBLEM DOES IT SOLVE?**

**WHY WILL CUSTOMERS CHOOSE YOUR BUSINESS OVER COMPETITORS?**

## **SECTION 3: YOUR BUSINESS IDEA & DIFFERENTIATION**

**DESCRIBE YOUR PRODUCTS AND SERVICES IN DETAIL:**

**WHAT UNIQUE VALUE PROPOSITION SEPARATES YOU FROM THE MARKET?**

**VISION STATEMENT (3-5 YEARS OUT)**

## MISSION STATEMENT (WHY DOES YOUR BUSINESS EXIST?)

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## SECTION 4: TARGET CUSTOMER PROFILE

<b>Age Range</b>	
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<b>Target Location</b>	
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<b>Gender Demographic</b>	
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<b>Average Income Level</b>	
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<b>B2B Customer Specs</b>	
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## KEY CUSTOMER NEEDS & SOLUTION

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## SECTION 5: MARKET RESEARCH & COMPETITOR ANALYSIS

COMPETITOR NAME	CORE STRENGTHS	IDENTIFIED WEAKNESSES

## MARKET DEMAND EVIDENCE

<input type="checkbox"/> Surveys Conducted	<input type="checkbox"/> Customer Feedback	<input type="checkbox"/> Online Research
<input type="checkbox"/> Existing Sales History	<input type="checkbox"/> Industry Reports	<input type="checkbox"/> Social Media Research

Provide detailed notes on demand evidence here:

## SECTION 6: MARKETING & SALES STRATEGY

### HOW WILL CUSTOMERS FIND YOU?

<input type="checkbox"/> Google Profile / Maps	<input type="checkbox"/> Professional Website	<input type="checkbox"/> Social Media Organic
<input type="checkbox"/> Word of Mouth	<input type="checkbox"/> Networking Events	<input type="checkbox"/> Email Marketing
<input type="checkbox"/> Online Advertising	<input type="checkbox"/> Local Partnerships	<input type="checkbox"/> Flyers & Offline

### CONTENT MARKETING PLAN

PLATFORM	CONTENT TYPE / THEME	FREQUENCY
Facebook		
Instagram		
LinkedIn		
TikTok		
Website Blog		

### PRICING & SALES REVENUE TARGETS

Describe your product/service pricing tiers and margin structure:

<b>Month 1 Target (£)</b>	
<b>Month 3 Target (£)</b>	
<b>Month 6 Target (£)</b>	
<b>Year 1 Target (£)</b>	

**SECTION 7: OPERATIONS PLAN & COMPLIANCE**

Key Operational Equipment & Software Required:

Primary Suppliers & Vendors:

**LICENCES, INSURANCE & COMPLIANCE FRAMEWORK**

<input type="checkbox"/> Public Liability Insurance	<input type="checkbox"/> Professional Indemnity
<input type="checkbox"/> GDPR / Data Compliance	<input type="checkbox"/> Health & Safety Policy
<input type="checkbox"/> DBS Background Checks	<input type="checkbox"/> Food Hygiene Certification

**SECTION 8: START-UP FINANCIALS & RISK MANAGEMENT**

<b>REQUIRED CAPITAL EXPENSE ITEM</b>	<b>COST (£)</b>
Equipment & Hardware	
Initial Marketing Asset Creation	
Website Design & Hosting	
Insurance Framework Setup	

REQUIRED CAPITAL EXPENSE ITEM	COST (£)
Initial Stock / Raw Components	
Licences & Registrations	
<b>TOTAL START-UP INVESTMENT NEEDED</b>	

## RISK ASSESSMENT MATRIX

IDENTIFIED RISK EVENT	LIKELIHOOD	IMPACT	PROACTIVE ACTION PLAN
Lack of initial customer traction			
Cash flow / runway issues			
Agile or aggressive new competitors			
Technology / service failures			

## SECTION 9: TIMELINE & ACTION STEPS

### NEXT 30 DAYS (IMMEDIATE SETUP)

<input type="checkbox"/> Register Corporate Entity	<input type="checkbox"/> Finalize Brand Identity/Logo
<input type="checkbox"/> Set Up Business Bank Account	<input type="checkbox"/> Claim Digital Channels/Socials

### NEXT 90 DAYS (MARKET VALIDATION)

### NEXT 12 MONTHS (GROWTH & SCALE)

## SECTION 10: BUSINESS SUPPORT REVIEW

Select areas where you require specialized mentorship or execution support from Beyond CIC:

<input type="checkbox"/> Business Planning	<input type="checkbox"/> Growth Marketing	<input type="checkbox"/> Web Development
<input type="checkbox"/> Digital Skillsets	<input type="checkbox"/> Funding Acquisition	<input type="checkbox"/> Financial Forecasting
<input type="checkbox"/> Entity Registration	<input type="checkbox"/> Social Media Management	<input type="checkbox"/> 1-to-1 Mentorship

<b>Applicant Name</b>	
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<b>Signature / Date</b>	
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### BEYOND CIC

Empowering entrepreneurs, social enterprises, and communities through comprehensive business support, digital inclusion initiatives, technical training, and sustainable enterprise development frameworks.