

Instructions

The business planning template is provided as a reference only. Include the relevant sections based on your business needs and modify sections where necessary.

Ideas for what to expect or write are provided in each section of the guide. It is best to avoid repetition and write simply and concisely using bullets instead of paragraphs. Remember, your business plan is a dynamic document—review regularly and adjust to reflect change in your business.

Executive Summary

The executive summary is written after you have completed your business plan. This includes a brief introduction (who you are (business), size, location, product or, service), vision, business structure and 1-2 sentences summarizing each section (production, sales and marketing, human resource, risk analysis, financial).

Business Overview

The business overview provides a description of your business—who you are, what you do and who you serve. You may include the businesses mission, business history and structure (sole proprietorship, partnership, or corporation), operational plan (resources, products (e.g. crop varieties or livestock breed) or services, production (e.g. seasonal) system and distribution, hours of operation etc.), competitive position, size of the market, competitors, management team and experiences.

Mission Statement

A mission statement might answer some of these questions:

What do we do? Who do we serve? How do we serve them? What are our values? What makes us different from other farms or agri-businesses?

Vision Statement

A vision statement might answer some of these questions:

What are our hopes and dreams? What problem are we solving for the greater good? Who and what are we inspiring to change?

Marketing and Sales Plan

Provide an overview of products or services to sell. Describe your marketing plan. Does it line up with your sales target? Describe your customer and does your marketing plan effectively reach that audience? Identify your main competitors and how will you differentiate your brand and product?

Production Plan

Provide an overview of your products or, services, activities, value addition, production season and cycle, production system including number of animals, acres/hectares, production resources (land, building, equipment) and production inputs as well as planning and management of nutrient, pest, food safety and environment.

If applicable, list your livestock type; breeding program; production timeline; on-farm or inspected slaughter, processing, value-added, etc.

If applicable, quantify cropping cultivation amounts (by acres, plants, bulbs, etc); production processes use, irrigation and drainage requirements, etc. production schedule, crop rotation; fertility, pest, disease management plans; production timeline; expected yields; harvesting, processing, storage, and value-added plans.

Human Resources Plan

Identify key human resources that are needed to fulfill your business goals. Include details and identify each position, responsibility, qualification, training, experience, and compensation, including you and your family members.

SWOT Analysis

Identify strengths (internal), weaknesses (internal), opportunities (external) and threats (external) facing your business.

Risk Analysis and Mitigation

Have you considered how some or all the following risk areas may affect your operation and how you plan to mitigate them?

- Personal (e.g. health, farm safety, relationships)
- Functional (e.g. production, technology, operations)
- Financial (e.g. money management, price, margins, real estate)
- Business Development (e.g. marketing, sales, negotiations, expansion)
- Human Resources (e.g. family, employees/labour, advisors, contractors)
- Planning (e.g. business continuity, business structure)
- Legal (e.g. contractual agreements, policy, and regulations)
- Environmental (e.g. climate and weather, location)
- Public (e.g. consumer advocacy, international trade, geo-political)

Financial Plan

Use the financial plan template that will take you through a series of steps to create a custom cash flow sheet for three years, an income statement, a balance sheet and an optional budget sheet.