

Name of organisation

Business Plan

Version 0.1 DRAFT

August 2012

Template developed by Mutual Ventures

For further information:

Visit www.mutualventures.co.uk

E-mail: info@mutualventures.co.uk

Twitter: [@MutualVentures](https://twitter.com/MutualVentures)

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1. Executive summary

(Note: this section should be written last, as it should to summarise the content of your business plan. However it is a crucial section, as this may be the only section many will read!).

This document lays out the business plan for the creation of THE MUTUAL. It covers:

- Our vision and values
- An analysis of the market place we will operate within
- An explanation of the range of services we will offer our members
- A description of our legal form and our governance arrangements
- An overview of the infrastructure needed to underpin our business
- Financial forecasts demonstrating the viability of our business
- An implementation plan outlining how we will establish the new enterprise

1.1. Drivers for change

1.2. Vision for the future

1.3. Our customers

1.4. Our services

1.5. Our staff and leadership

1.6. Sustainability

3. Purpose and vision -

3.1. Vision

What is the vision your enterprise – what change do you want to make

3.2. Mission

What is the mission of your enterprise – what are you going to do to make the change

3.3. Strategic objectives

Outline your strategic objectives - what practical steps will you take in the medium to short term to achieve you strategic aims

3.4. Values

What are the values of your enterprise – the belief system which your enterprise will adopt

5. Customers

Describe here who your current and potential customers are, what their specificities are, what services they could be interested in, etc.

5.1. Customer segmentation

5.2. Existing customer buying characteristics

5.3. Customer commitment

7. Organisational form

7.1. Legal form

7.2. Eligibility for membership

7.3. Governance

How will the enterprise be structured and managed? Will you have a management board? How will decisions be taken? Set out the organisational design and governance of your enterprise.

7.4. Board of Directors

7.5. Senior Management Team

7.6. Distribution of surpluses

9. Stakeholders

[NOTE: PLEASE REFER TO MUTUAL VENTURES STAKEHOLDER ANALYSIS TEMPLATE]

Identify and provide information on the individuals, groups, agencies, unions or other organisations who will have an influence on or be affected by, or involved with your mutual. Describe the benefits of your enterprise to each group.

Typically this would include:

- Your clients/customers
- Your beneficiaries or end users
- Key influencers

11. Resources

Set out the practical resources you will need to deliver your service. Demonstrate that you understand what is required to deliver your service and meet your strategic aims.

Set out what you already have in place, what is in process and what still remains to be implemented before you can start trading.

11.1. Premises

11.2. Equipment

11.3. Back office

11.4. Systems

11.5. Legal and audit

11.6. Contracts

11.7. Licenses and insurance

13. Implementation plan

[NOTE: PLEASE REFER TO MUTUAL VENTURES IMPLEMENTATION PLAN TEMPLATE]

This section should highlight the core activities to undertake in the coming months till the mutual goes live (and potentially beyond).

For each core activities, underline key tasks to undertake, timeline and potentially responsibility, dependencies, etc.