

# The business plan

Absolutely necessary when seeking financing for a project.

## TRAINING OBJECTIVES

To be able to build a business plan, to present it and defend it in front of investors or finance people, so as to have the best opportunities to reach its goals.

## SCHEDULE

When is a business plan necessary ? :

- For a project requiring external financing (bank - investors)
- To drive its business over the medium term
- To inform and communicate (commercial impact)

The business plan's key steps :

- What problem my business plan is dealing with?
- The market survey (The Porter forces)
- The product offer (Unique Selling Proposition)- target, channel, positioning ...
- The business model (Osterwalder approach)
- The marketing approach (the 4 P)
- The action plan: the required resources (production, distribution ...)
- The present team, the future team: its alignment with the project
- The risks: what are they, how to evaluate them, to mitigate them?
- The financial information: profit and loss, balance sheet and cash statement
- Why is financing required ?
- How the investors or the bank unwind the operation?
- The executive summary
- The team work and the iterative process

To present the business plan in writing and orally :

- Understand the constraints and objectives of the investor or of the banker
- The keys of a successful document which will be read
- The oral presentation: to incite, not to frighten
- Be ready to answer touchy questions

To whom should the business plan be presented ? :

- The various investors (capital risk, development ...)
- The banks
- The associations (réseau Entreprendre, Initiative, CCI ...)

## SKILLS TARGETED

- To master the key steps for the business plan elaboration
- To understand the objectives and limitations of investors
- To know the keys elements for an efficient presentation



REF: TR005

**DURATION:**

2 days

**TRAINER:**



**Michel Pivot**

Chief Financial Officer,  
Operational advising in  
finance to businesses

**TARGETED PUBLIC:**

- Managers
- Management teams
- Business creators

**CONDITIONS:**

- To know how to read  
a balance sheet and  
a profit and loss

DAF Evolution SARL with a capital of 5 000€

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