

Business Action Plan

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Date:

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Vision – Where are we heading?

Mission – How are we going to get there?

Values – What do we stand for? What are our guiding principles and values that are important to how I/we do business?

Key Objectives and strategies

Provide clear, concise objectives of where you want to take the business in the next 3 years.

Revenue and profit goals

	2024	2025	2026	2027	2028
Sales					
Gross Profit					
% Gross Profit					
Net Profit					

Business Goals for the next 12 months

Major Initiatives, objectives and issues

What are the major initiatives, objectives and issues that you will need to focus on in order to achieve your goals?

It is best to complete this section after you have completed the rest of the document as this really is a one page summary.

Short Term – 1 to 6 months	Medium Term – 6 to 12 months	Long Term – 12 + months
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.
6.	6.	6.
7.	7.	7.
8.	8.	8.
9.	9.	9.
10.	10.	10.

Limiting factors for growth

What are the major limiting factors for growth?	What is your action plan to eliminate or minimize the impact on your growth?

Competitor Analysis – how do I/we compare?

Go through the list below and rate you/your business and your competitors (it is also a good idea to have someone else complete this for you to gauge perception).

	You or your company	Competitor 1	Competitor 2	Competitor 3	Competitor 4
	Poor.....Excellent	Poor.....Excellent	Poor.....Excellent	Poor.....Excellent	Poor.....Excellent
Reputation	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Professionalism / Image	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Management Skill	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Location & Premises	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Product Quality	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Range of Services	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Customer Service	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Performance	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Property Marketing	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Client Nurturing	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Customer Relationships	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Ease of Doing Business	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

Customer Perception

How are you/we currently perceived by our customers?	In the ideal world, how would you like your/our customers to perceive you/us?

Networking Plan

What are the major networking opportunities?

Networking Group or Association	What activities can help to maximise my/our presence?

Sales Plan

What are your overall Sales Objectives? What specific areas do we need to focus on to improve our people and the business? (or just yourself)

Examples: Selling skills, product knowledge, hiring, management, training

Action Objectives What specific strategies are you going to implement?	Milestones or Major Tasks	Who is responsible?	When – date completed

Customer Service Plan

What are your overall Customer Service Objectives? What specific areas do we need to focus on to improve my/our customer service?

Examples: Customer communication, problem handling, delivery issues, professionalism

Action Objectives What specific strategies are you going to implement?	Milestones or Major Tasks	Who is responsible?	When – date completed

Technology Plan

What are your overall Technology Objectives? What specific actions can you implement to improve management and utilization?

Examples: Internet, new equipment, equipment management, functionality, integration and maintenance

Action Objectives What specific strategies are you going to implement?	Milestones or Major Tasks	Who is responsible?	When – date completed

Financial Plan

What is your overall Financial Plan?

	2024	2025	2026	2027
Mortgage Commission Received	\$	\$	\$	\$
Cross Sell Revenue Received	\$	\$	\$	\$
YBR Aggregation Leasing	\$	\$	\$	\$
AIA Financial Wellbeing				
Allianz Insurance	\$	\$	\$	\$
Less Overhead Expenses				
General Expenses	\$	\$	\$	\$
Wages	\$	\$	\$	\$
Commission Referrers	\$	\$	\$	\$
Commission Contractors	\$	\$	\$	\$
Profit Share (contractors)	\$	\$	\$	\$
Consumables	\$	\$	\$	\$
Profit Share (Employees)	\$	\$	\$	\$
Expenses (Employees)	\$	\$	\$	\$
Total Expenses	\$	\$	\$	\$
Net Profit before Tax	\$	\$	\$	\$

