

Social Enterprise Business name:

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1. **Provide a short (max 200 words) description of the commercial business element of the enterprise.**

Use language that is interesting and that makes sense. Imagine that the reader knows very little about your idea.

Lined area for writing the description of the commercial business element of the enterprise.



2. **Provide a short (max 200 words) description of the benefits to the community.**

'Community' can mean local, national, or specific group of people.

Explain how you will promote the social benefits, whilst maintaining a secure profit base,  
- providing jobs, supporting needy groups, improving the local environment, up-skilling  
long term unemployed...

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3. **Describe a typical experience for a customer, starting with recognising a need for your service or product to realising a regular need for you.**

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4. **Explain what research you have done that provides evidence of need.**

Divide this into 3 main areas:

1. Who are your customers or clients?
2. What specific gaps are you filling?
3. Who are your competitors?

Add information on numbers of people you will attract, whether they need special services and what. Detail what competitors are doing and where the gaps are. Include if there are opportunities for working with other enterprises to reduce cost, and share or provide services and products they do not have.

Add a little about whether your research has motivated you to change your plans, for instance made you revise services or gain training to provide a slightly smarter service.

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### 5. What is your Enterprise Mission, aims and objectives?

The Mission statement should be catchy and positive and show how your enterprise is for people and profit.

The aims list what you will do and objectives are how you will do it. For example (Aim) 'xxx company will provide a variety of healthy sandwiches and salads for local offices and homeless people in the xxx area by (Objective) working with local organic fresh produce providers, and by training food hygiene and food preparation skills to unskilled people.

Mission Statement:

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Aim:	Objective:
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### 6. What are the enterprise activities?

Where you will operate from?

How your charging has been worked out?

How will it be delivered practically (Delivery route and cost)?

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### 7. People in the enterprise (Roles and skills)

Roles: Management and government

Finance

Other staff

Skills: Report writing, monitoring and evaluation, policy development

Funding applications

Marketing and publicity

Other skills

Think about who and how will decisions be made (how will you involve customers and staff); Research job descriptions; Staff costs; When will staff be recruited (useful to know when preparing budgets); Board and staff training – what how and when.



### 8. Provide detail on your income. Provide a 1 year cash flow forecast

Explain each income stream separately. Include volunteer time (it is important to record all time worked whether paid or not, as it defines the real cost of providing your service).

Explain how you expect income to increase, maybe as customer numbers go up, or as staff become more trained.

Will there be any variations in income due to times in the seasons or type of product you are selling.

A large rounded rectangular box containing horizontal lines for writing, intended for providing details on income and a 1-year cash flow forecast.



### 9. Provide detail on your expenditure onto the cash flow analysis

Explain how you have arrived at these figures

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### 10. Provide evidence of confidence

Customers and funders will want reassurance that your quality is good and potential for good business is demonstrated. Show what professional qualifications are required, and how you have met the need.

Think about what policies, procedures and processes you need in place. Are you working towards a quality mark? How will you ensure the health and safety of your staff, volunteers and customers. Include a business insurance quote in your expenditure. Add some other detail that shows you are thinking of any odds like managing waste, risk assessment, contingency planning.

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11. **Explain how you will publicise your service or product. (A short bullet point answer only is required here).**

Here is a starter list:

- Marketing Plan
- Free local press release
- Open Day event
- Leaflets
- Collaborator workshop

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Add at least 4 others by researching

12. **Explain which legal structure you are considering, and why. (Max 100 words)**

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13. **Explain where you might go for help in improving this document after the course end. Attach a summary of the areas where your skills and experience are strong, and which other skills you may need.**

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Despite taking part in this course, it is unlikely that you can proceed to actually start a social enterprise alone. In fact the concept of social enterprise expects you to build a team around the business.

Note here any Business support organisations that you could approach, or local social enterprises that you will not compete against, or national social enterprises that do something similar, but not locally.

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Explain how you approached family and friends, and their comments. How did you combat any negatives, and harness more positive feedback.

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**14. Create and attach a GANTT chart briefly detailing the actions and the timeline for each action (See example at Extra 12.2)**

Congratulations. You now have your Business Plan, and are at the final stage. The GANTT chart will focus you on what needs to be done and when. It should match your budget/cashflow analysis.

For this course it is necessary only to understand how a GANTT chart works. You can list the main actions by reading through your course Business Plan above. But in real practice it is best to detail everything, perhaps starting with:

Generating interest from family and friends	Pre-month 3
Developing a Board or Steering Group	Pre-month 2
Opening a business bank account	Pre-month 1

Remember that the timelines are flexible, but if something slips, make sure you check any changes needed elsewhere.



Action	Pre Months			Trading Months											
	3	2	1	1	2	3	4	5	6	7	8	9	10	11	12
<b>Marketing</b>															
1 Create Marketing Plan															
2 Open Day Event															
3 Create Open Day guest list															
4 Create posters/flyers															
5 Set up website/social media															
6 Prepare local press advert for event															
7 Revise leaflets following feedback															
8 Review Marketing Plan															

