



MASTERPLAN LEAN

PLEASE FILL IN YOUR ANSWERS

Company Name			
Existing Business	<input type="checkbox"/> Existing Business	<input type="checkbox"/> New Business	
Business Type	<input type="checkbox"/> Selling Product	<input type="checkbox"/> Selling Service	
Tax Name		<i>Each world region has their own tax such as GST, VAT, State Tax etc. Put in tax that is applicable in your country</i>	
Currency			
Year		Month	

Business Overview:



What do you do?

Write a single statement that describes what your business does.

Customer Testimonial

Provide a quote from your customer that tells the world how good your product/service is

Who gave this testimonial

Business Background

Provide a brief background on your company

Credibility

Short description that could explain your product/service credibility

Special Offering

what is special about your offering

Product/Service Advantage

Short description that could explain your product/service advantage (124/200)

Products Forecast



Product	Last Year Sales 2017/2018	Forecast Growth 2018/2019	Cost of Sales

Our Team



Who are the key people in your organisation? Investors and banks will want to see that the team is passionate and going to deliver. Provide the name, Job title and background in the list below:

Name	Job Title	Background

Our Culture



We employ people that:

We want our customers to remember our brand because:

We encourage a workplace environment that is:

Target Markets



Target Market	Potential Revenue (%)	How can you be more successful in this segment?	How well have you	
			Meet their needs	Marketed to them
			<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low	<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low
			<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low	<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low
			<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low	<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low
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			<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low	<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Medium <input type="checkbox"/> Medium Low <input type="checkbox"/> Very Low

Customer Needs



Criteria (Area of Observation)	Comparison to our competitor									
	Poor			Equal				Better		
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	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10
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	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10

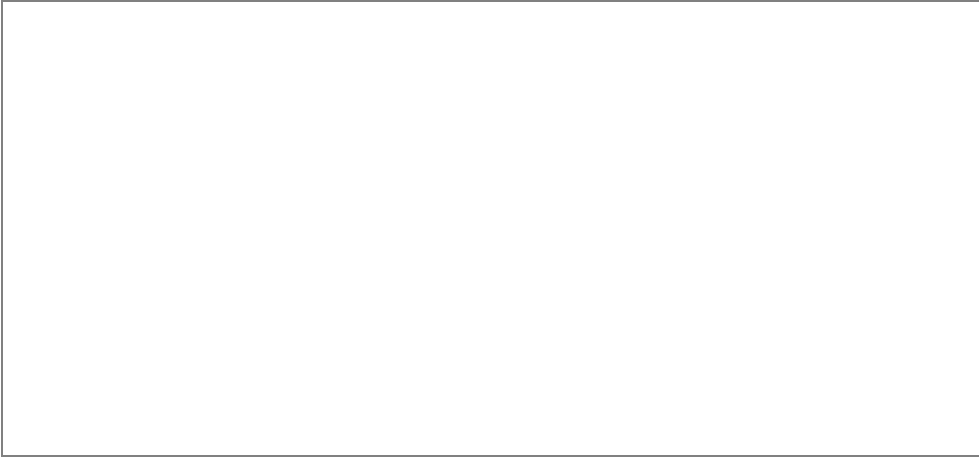
Who are your competitors?



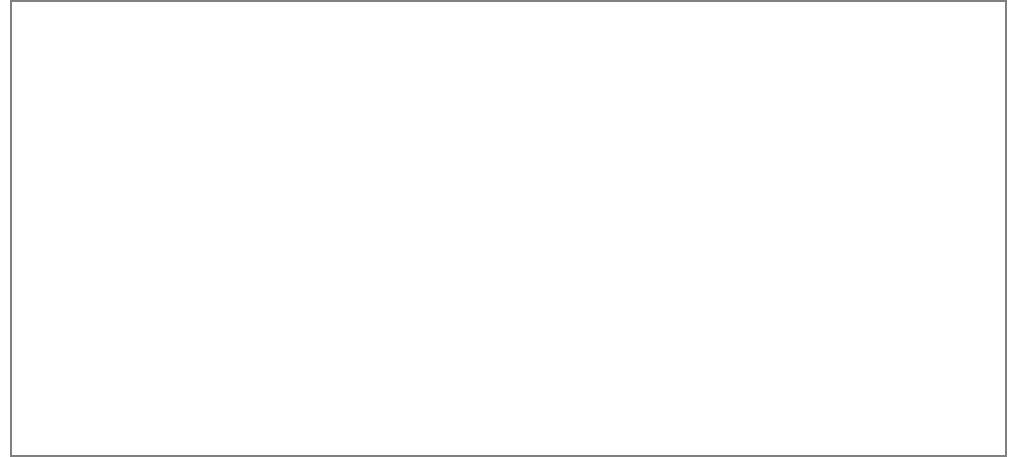
Competitor Name	What they do better	What we do better	Comparison	
			Product / Price	Marketing / Web
			<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor	<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor
			<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor	<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor
			<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor	<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor
			<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor	<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor
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			<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor	<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor
			<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor	<input type="checkbox"/> Better than competitor <input type="checkbox"/> Same as competitor <input type="checkbox"/> Worse than competitor

Our Culture

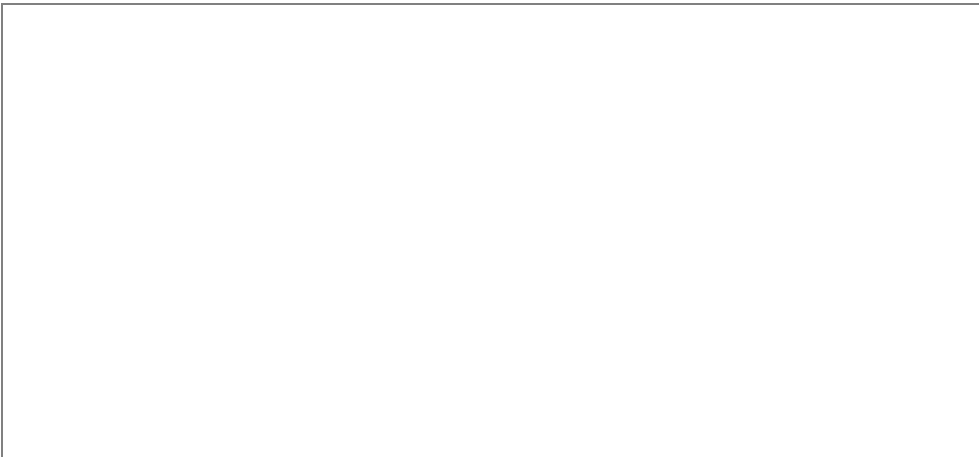
Strengths: What are the strengths of your business?

A large, empty rectangular box with a thin black border, intended for writing the strengths of the business.

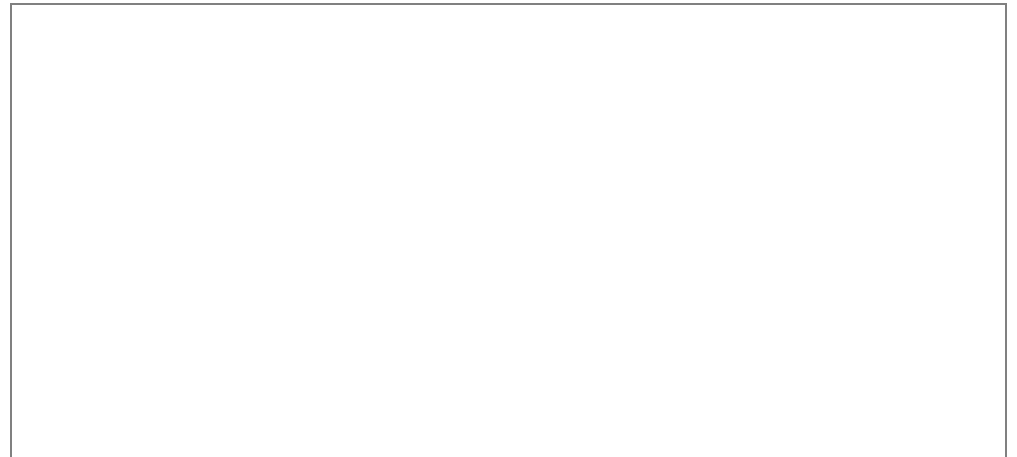
Weaknesses: What are the weaknesses of your business?

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Opportunities: What are the opportunities in your business?

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Threats: What are the threats of your business?

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Goals

The big 3 goals – Summarise your top 3 business goals

	Goal 1	Goal 2	Goal 3
Objective Item			
Objective Figures			
Short Description			

Shareholder Goals:

Revenue & Financial Goals:

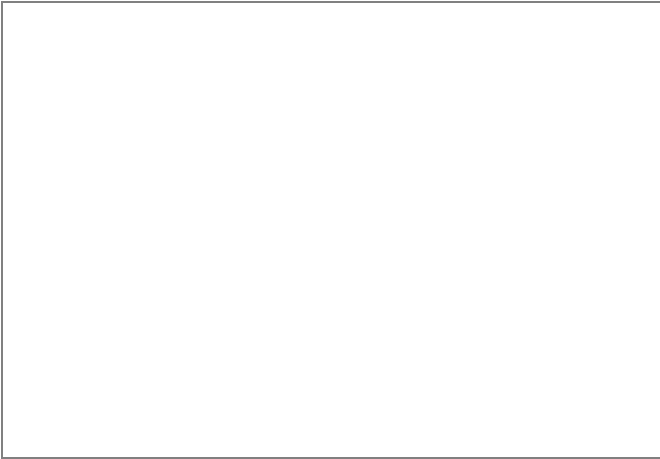
Customer & Marketing Goals:

Systems & Processes Goals:

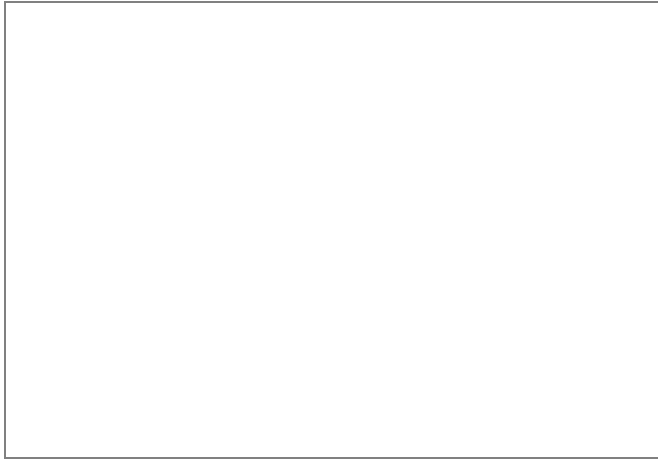
Innovation & People Goals:

Strategies

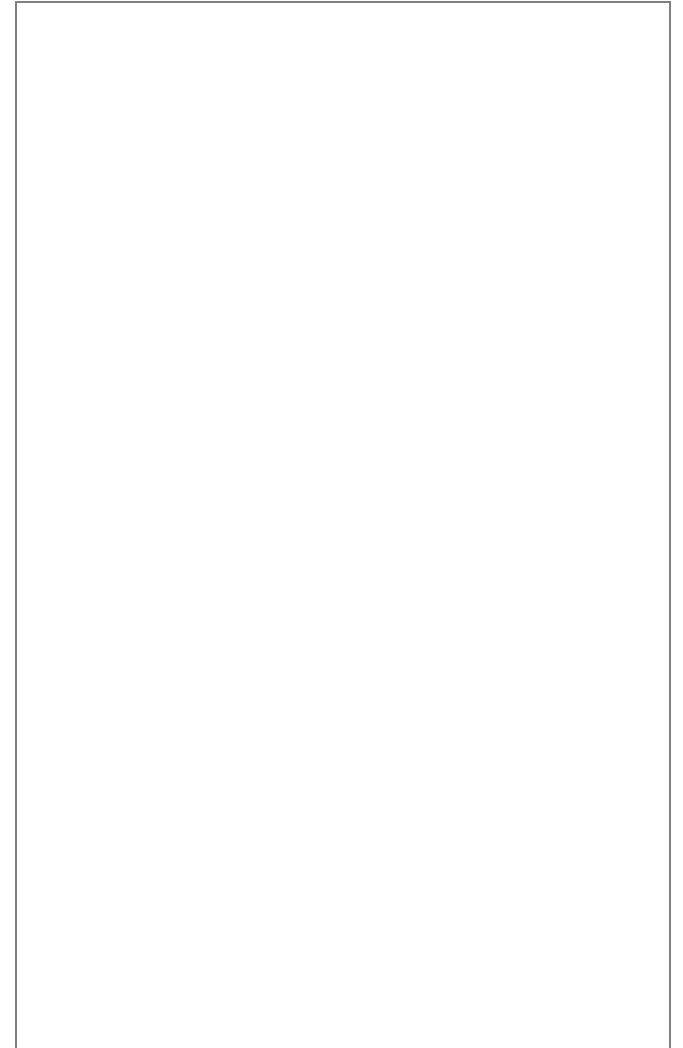
Product Strategy

A large, empty rectangular box with a thin black border, intended for writing the Product Strategy.

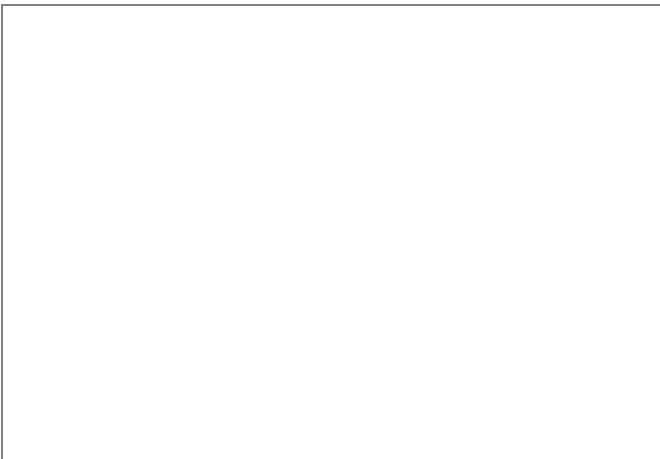
Price Strategy

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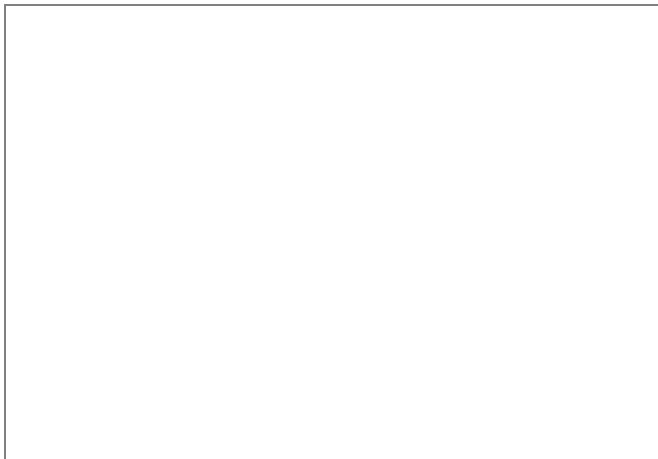
Promotional Strategy

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Distribution & Channel

A large, empty rectangular box with a thin black border, intended for writing the Distribution & Channel strategy.

Influencer Strategy

A large, empty rectangular box with a thin black border, intended for writing the Influencer Strategy.

Strategic Goals



Type	Strategic Goal	Action	Accountable User	Due Date / Status
<input type="checkbox"/> Financial <input type="checkbox"/> Marketing <input type="checkbox"/> Human Resource <input type="checkbox"/> Customer <input type="checkbox"/> Innovations <input type="checkbox"/> Systems				
<input type="checkbox"/> Financial <input type="checkbox"/> Marketing <input type="checkbox"/> Human Resource <input type="checkbox"/> Customer <input type="checkbox"/> Innovations <input type="checkbox"/> Systems				
<input type="checkbox"/> Financial <input type="checkbox"/> Marketing <input type="checkbox"/> Human Resource <input type="checkbox"/> Customer <input type="checkbox"/> Innovations <input type="checkbox"/> Systems				
<input type="checkbox"/> Financial <input type="checkbox"/> Marketing <input type="checkbox"/> Human Resource <input type="checkbox"/> Customer <input type="checkbox"/> Innovations <input type="checkbox"/> Systems				

Profit Forecast



Forecast Notes and Assumptions

It is anticipated that you will achieve this increase in sales because:

	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023
Revenue					
Cost of goods %					
Cost of Goods					
Gross Profit					
Gross Margin					
EBIT					
Margin %					

