



**BUSINESS PLAN  
GUIDELINES AND  
INFORMATION  
CHECKLIST**

Please note that this section only provides guidelines to assist you with compiling a business plan that meets Isivande Women's Fund minimum information requirements and does not require all submissions to follow this format.

### **Executive Summary**

Provide a brief description of the business, the reason the funding is required, background on the management and an overview of the socio-economic benefits.

- Describe the products or services you are offering.
- Give historical background of how the idea originated.
- Give your short, medium and long term business goals or objectives.

### **Purpose of Required Funding**

Motivate why capital is required and provide details of how these funds will be utilized.

### **Products and Services**

Describe the product and/or services offered and give a detailed explanation on the following:

- Specifications of products / services – what is the range of products or services rendered.
- Describe how and to whom the services or products are sold and marketed.
- Unique Selling Proposition – How different are you from your competitors
- Potential and new product developments
- Benefit to the user

### **Sector analysis**

Provide a summary on information on industry by including the following:

- Summary of the industry
- Value drivers and industry price structures – What are the main drivers and how price competitive is your company?
- Trends and challenges facing the industry/Sector
- What are the recent developments
- How is the market segmented and why
- Legal and regulatory environment
- Economic outlook
- Industry Specific Risks

## **Target Market Analysis**

Provide information on customers by including the following:

- Market analysis (size and growth in terms of products, money value and number of customers)
- Target market and geographical coverage
- List of existing and potential customers
- Letters of intent, contracts and orders on hand
- Bargaining power of customers
- Growth opportunities i.e. new products / new customers
- Distribution channels – how is your product delivered to your clients.

## **SWOT ANALYSIS**

Give details on the following aspects:

- Strengths of your company
- Weaknesses facing your company
- Growth opportunities that the company can take advantage of; and
- Growth constraints and threats that are facing your company.

## **Competitor Analysis**

Provide information on competitors by including the following:

- Market share
- Barriers to entry and new entrants
- Details of marketing budget
- Marketing strategy to realize objectives

## **Management and Human Resources**

Provide information on management and human resources by including the following:

- Management experience and qualifications
- Number of employees
- Training programmes
- BEE percentage

### **Summary of all internal and external risks**

List and provide a summary of information on the principle risks that the entity is subject to and how these risks will be addressed.

### **Socio Economic Benefits**

Provide information on socio-economic benefits by including the following:

- Job creations
- Poverty alleviation
- Women participation
- Skills transfer / training
- Industrial growth and development
- Number of households to benefit

### **Financial Analysis**

See attached templates for layout of financial statements. Please provide the following and state assumptions used in projections:

- Income Statement
- Balance Sheet
- Cash Flow

Financials should reflect historical information plus 3 year forecasts.

Please provide the recent management accounts if the business is already in existence.

The first year of financial forecasts must be broken down month by month.

Please include commentary on the financials to date and the forecasts as well as:

- Key assumptions used in compiling cash flow forecasts

Motivate why forecasts on sales are achievable and costs are reasonable.

### **Motivation**

Give motivation for your application.