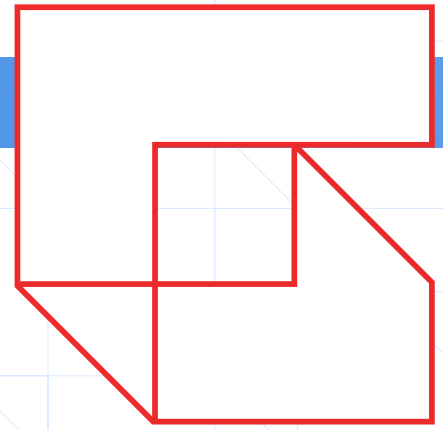


QUICK START GUIDE

Creating a Better Business Plan:

A Template to
Organize Your
Strategies and Goals



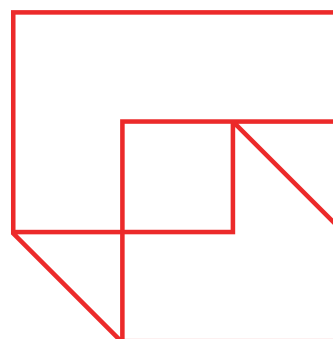
Global Technology Industry Association



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GTIA Channel Development Advisory Council

Table of Contents

A Template to Organize Your Strategies and Goals	3
Template Instructions	4
Identity & Big Picture: About Your Organization	6
Strategy: Core Marketing Information	7
Goal Setting & Measuring Success: Scoreboard and Metrics	9
One-Year Plan	9
Goal Setting & Measuring Success: Scoreboard and Metrics	10
Three-Year Plan.	10
Goal Setting & Measuring Success: Scoreboard and Metrics	11
Five- to 10-Year Plan	11
Execution	12
What's Next?	13
Acknowledgements	15



A Template to Organize Your Strategies and Goals

A structured, organized business plan can serve as a roadmap to guide a company's strategic direction and decision-making processes. A well-crafted plan helps identify goals, allocate resources efficiently and anticipate potential challenges.

With this in mind, the GTIA Channel Development Advisory Council created this business plan template to provide MSPs, solution providers, vendors and other tech businesses with a clear framework for measuring progress and adjusting strategies as needed.

Please read the instructions first, then fill out the blank form and finally read through the next steps to ensure that your business plan can help you be more successful. After all, a strong business plan can help foster alignment among team members and ensure that everyone is working towards common objectives that contribute to the company's growth and long-term success.



Template Instructions

This business plan template helps businesses clarify their vision, gain traction and organize their strategies and goals. Here is a step-by-step guide on how to fill out the template.

The Basics: Filling Out the Template

- **Be Concise:** Keep your entries clear and succinct. The template is meant to be a high-level overview, not a detailed plan.
- **Be Specific:** Whenever possible, use specific, measurable objectives rather than vague statements.
- **Collaborate:** Engage your leadership team in filling out the template. This ensures alignment and buy-in from all key players.
- **Review and Update:** Regularly revisit and update your template. It's a living document that should evolve as your company grows and the market changes.

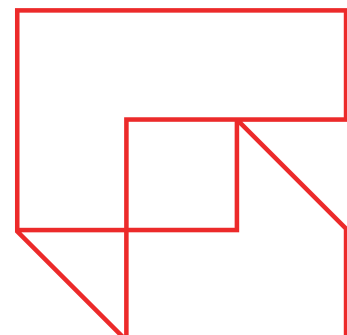
About the Fields

Identity & Big Picture

- **Mission Statement:** Summarize the purpose, intention and values of your company into a brief statement that all employees, customers and stakeholders can understand and follow.
- **Core Values:** Define the fundamental beliefs and guiding principles of your organization. These should be key traits that you seek in team members and that dictate how the company operates.
- **Core Focus:** Articulate your company's purpose or cause and its niche.
- **Purpose:** State why the company exists.
- **Niche:** State what you do best.

Strategy

- **Marketing Strategy:** Break this down into:
 - Total addressable market
 - Target market: Define who your ideal customers are
 - Potential competitors



- Three unique value propositions: Identify three things that differentiate your business from competitors
- Proven process: Outline the process you follow to ensure customer satisfaction
- Guarantee: Offer a compelling guarantee that reduces the perceived risk of purchasing your product or service
- Marketing channels
- **Initiatives:** Identify the most critical priorities for the next 90 days. These should be significant achievements that move the company toward its one-year plan and three-year picture.

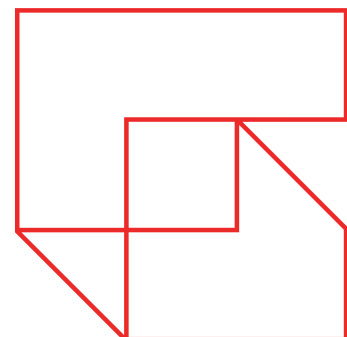
Goal Setting:

- **Scoreboard:** Develop a set of five to 15 key metrics that provide a quick overview of the company's health. Update and review these metrics regularly to ensure you're on track.
- **One-Year Plan:** Set specific, measurable goals for the upcoming year that align with your three-year picture and 10-year target.
- **Three-Year Picture:** Describe what your company will look like in three years. This can include revenue, number of employees, key achievements and other critical metrics.
- **5- to 10-Year Outlook:** Identify a long-term, ambitious goal for your company. This should be a clear, measurable objective that provides direction for the entire organization.

Execution:

- **Issues List:** Compile a list of issues currently hindering your progress. These can be challenges, obstacles or opportunities that need to be addressed.
- **Responsibility and Action:** Convert issues from your list into actionable items. Assign each issue to a team member and set deadlines for resolution.
- **Meeting Pulse:** Establish a regular meeting rhythm to review progress, address issues and refine plans. This could include daily huddles, weekly team meetings and quarterly planning sessions.

By methodically filling out this template, you'll have a strategic roadmap that aligns your team, clarifies your goals and focuses your efforts on what's most important for your business's success.



Identity & Big Picture: About Your Organization

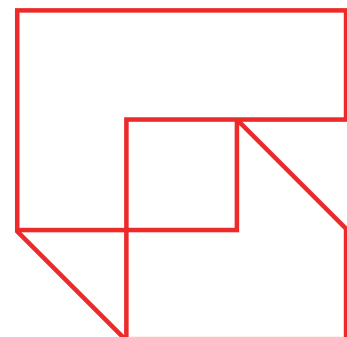
Mission Statement:

Core Values:

Core Focus

Purpose:

Niche:



Strategy: Core Marketing Information

Total Addressable Market:

Your Target Market:

Potential Competitors:

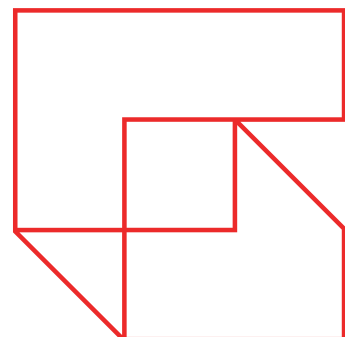
Three Unique Value Propositions:

1.

2.

3.

What Makes You Unique?



Proven Process:

Guarantee:

Marketing Channels:

1.

2.

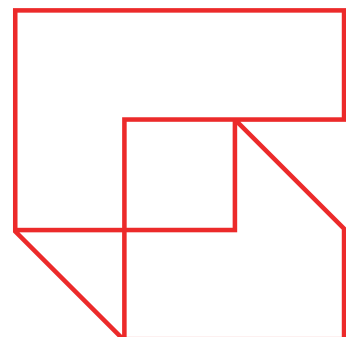
3.

Initiatives:

1.

2.

3.



Goal Setting & Measuring Success: Scoreboard and Metrics

One-Year Plan

Revenue Goal: \$ _____

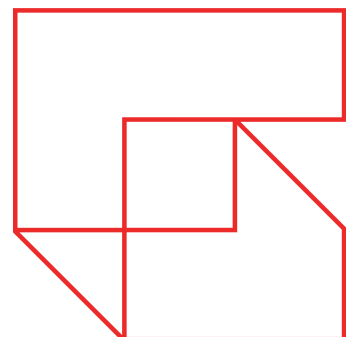
Profit Goal: _____%

Other Measurables:

What Does it Look Like:

Three Initiatives for the Year:

1. _____
2. _____
3. _____



Goal Setting & Measuring Success: Scoreboard and Metrics

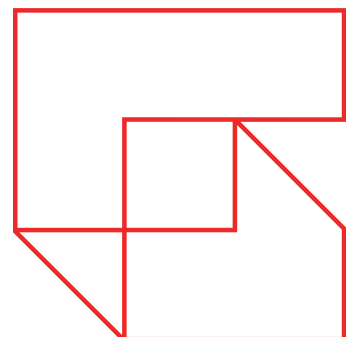
Three-Year Plan

Revenue Goal: \$ _____

Profit Goal: _____%

Other Measurables:

What Does it Look Like:



Goal Setting & Measuring Success: Scoreboard and Metrics

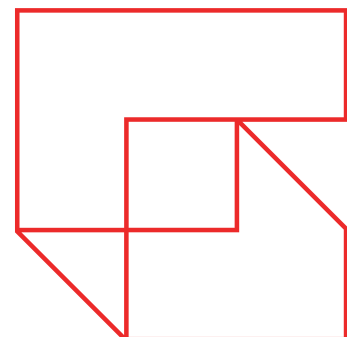
Five- to 10-Year Plan

Revenue Goal: \$ _____

Profit Goal: _____%

Other Measurables:

What Does it Look Like:



Execution

Breakdown How You Get There

Issues List

1. _____
2. _____
3. _____

Responsibility and Action

Task : _____

Responsible Party: _____ Due Date: _____

Task : _____

Responsible Party: _____ Due Date: _____

Task : _____

Responsible Party: _____ Due Date: _____

Task : _____

Responsible Party: _____ Due Date: _____

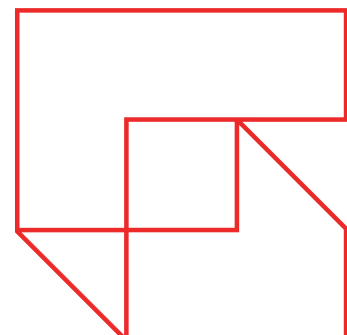
Task : _____

Responsible Party: _____ Due Date: _____

Meeting Pulse

Cadence: _____

Attendees:



What's Next?

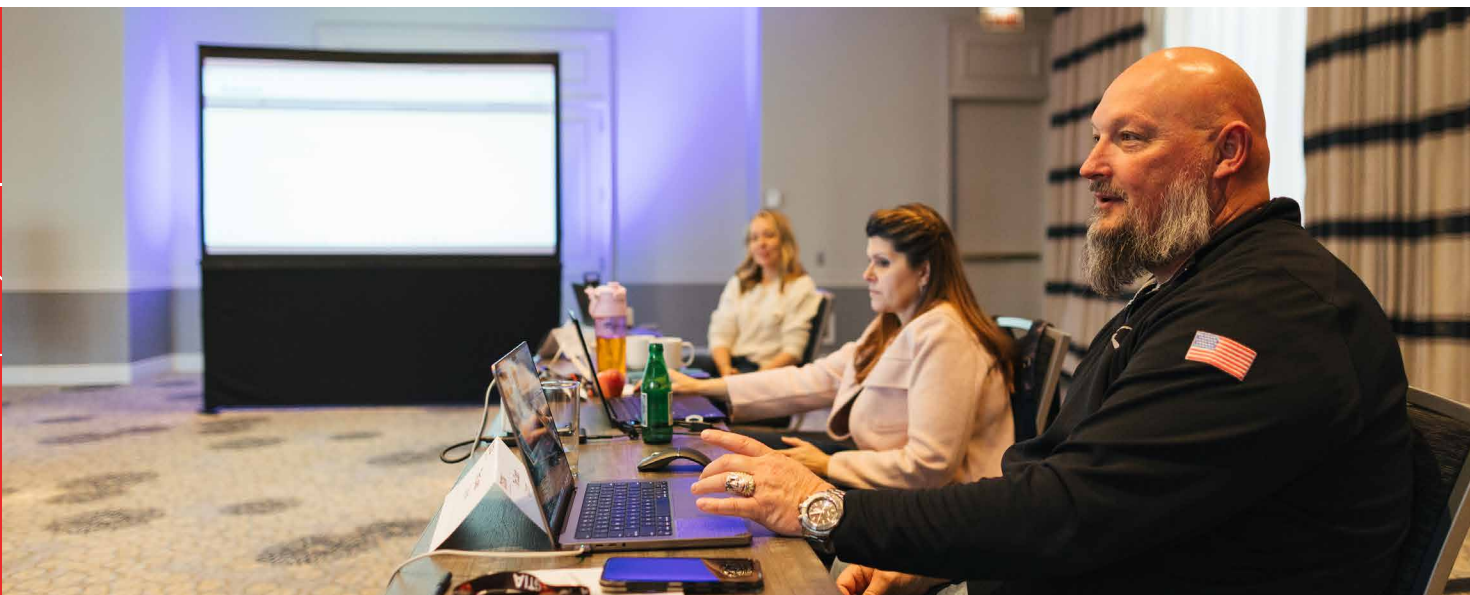
How to Execute:

- Identify your key players and roles
- Determine your ongoing meeting cadence
- Track metrics that matter
- Identify tasks that support core initiatives and values
 - Review of tasks
 - Addressing conflict and friction
 - Celebrating wins and owning and correcting the missteps
- Communicating and disseminating the plan
- Repeat the cycle

Why Does This Matter?

Continuous Alignment and Clarity

- **Regular Check-Ins:** Frequent meetings ensure that all team members are on the same page, understand the current progress and know what is expected of them.
- **Clarification of Goals:** Ongoing discussions help continuously refine and clarify the business plan's goals, ensuring they remain relevant and achievable.



Real-Time Problem Solving

- **Immediate Issue Resolution:** Regular meetings allow for the timely identification and resolution of any issues or roadblocks that arise, preventing them from escalating.
- **Collaborative Problem Solving:** Meetings provide a platform for collaborative brainstorming, leading to innovative solutions and better decision-making.

Accountability and Progress Tracking

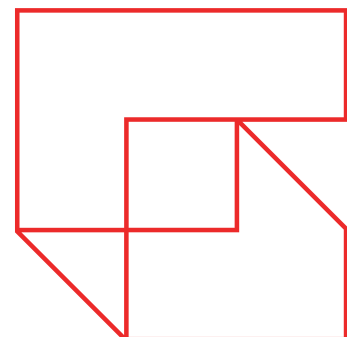
- **Progress Updates:** Frequent meetings ensure that progress is regularly monitored, and any deviations from the plan can be quickly addressed.
- **Accountability:** Regular check-ins help in holding team members accountable for their tasks and responsibilities, fostering a sense of ownership.

Feedback and Improvement

- **Continuous Feedback Loop:** Ongoing meetings provide a continuous feedback loop, allowing for the refinement and improvement of the business plan based on new insights and information.
- **Adapting to Change:** Regular discussions enable the team to adapt the business plan in response to changing market conditions, customer feedback and other external factors.

Team Engagement and Morale

- **Engagement:** Regular meetings keep the team engaged, ensuring that everyone feels involved and valued in the planning process.
- **Boosting Morale:** Frequent communication helps in building a strong team spirit, boosting morale and fostering a positive work environment.



Strategic Planning and Execution

- **Long-term Vision:** Regular meetings help in keeping the long-term vision in focus while managing short-term objectives and tasks.
- **Strategic Adjustments:** They provide an opportunity to make strategic adjustments as the business environment evolves, ensuring the plan remains aligned with overall business goals.

Implementing an Effective Meeting Pulse

- **Set a Regular Schedule:** Establish a consistent meeting schedule (e.g., weekly, bi-weekly) to ensure regular check-ins.
- **Agenda and Objectives:** Prepare a clear agenda for each meeting with specific objectives to keep discussions focused and productive.
- **Action Items:** Assign clear action items and responsibilities at the end of each meeting to ensure follow-up on discussed points.
- **Use Technology:** Leverage technology for scheduling, video conferencing and collaborative tools to enhance communication and documentation.
- **Encourage Participation:** Foster an inclusive environment where all team members feel comfortable sharing their thoughts and ideas.



Acknowledgments

This resource was created by the GTIA Channel Development Advisory Council, comprised of executives from across the industry who collaborate and share their expertise and experience to develop programs, tools and other resources that benefit the IT channel.



**Channel Development
Advisory Council**

Global Technology Industry Association