

Planning for Success with Your Authorized Dealership

Business Plan Outline
& Workbook



Created by RS&I, Inc.

Plan for Success

You've probably heard the old proverb, "he who fails to plan, plans to fail." As seemingly simple as this concept is, it couldn't be more accurate, especially when it comes to setting up and running a successful Authorized Dealership. If you want to sell a product or service on behalf of another company as an Authorized Dealer, it is critical to have a well-thought-out, written business plan.

This workbook will provide you with both a business plan outline and a workbook. As you use these tools, please keep in mind your business plan should be tailored to your business. Use this as a guide, but also feel free to include additional information or adjust certain sections to better meet your individual needs.

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Authorized Dealership Business Plan Outline

- I. Executive Summary**
- II. Company Overview**
 - A. Business Information
 - B. Industry Background
 - C. Value Proposition
 - D. Available Capital
- III. Market Analysis**
 - A. Market Data
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 - C. Competitive Data
- IV. Marketing Plan**
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 - B. Marketing Strategies/Tactics
 - C. Advertizing Plan/Budget
 - D. Marketing and Sales Strategy
- V. Operational Plan**
 - A. Performance Measurements
 - B. Definition of Roles & Responsibilities
 - C. Timelines
 - D. Facilities Plan
 - E. Employee Training
- VI. Financial Plan**
 - A. Capital Requirements
 - B. Budget Strategy

Company Overview

Provide a brief overview of your business information:

Business Name: _____

Owner Name: _____

Business Contact Information: _____

Do you currently do business? Or, is this a new venture?

- If you currently do business, what kind of business do you have? (ex. storefront, door knocking, events, etc.)
- What products do you currently sell?

Do you have any relevant industry background? Please explain.

What is your value proposition?

TIP: A value proposition is a promise of value to be delivered and acknowledged and a belief from the customer that value will be delivered and experienced. A value proposition can apply to an entire organization, or parts thereof, or customer accounts, or products or services.^[1]

Company Overview

How much capital do you have to invest in this business?

- Startup capital?
- Marketing funds?

Market Analysis

Market Data

How big is the overall market (\$\$ per year)?

Has it grown in the last five years?

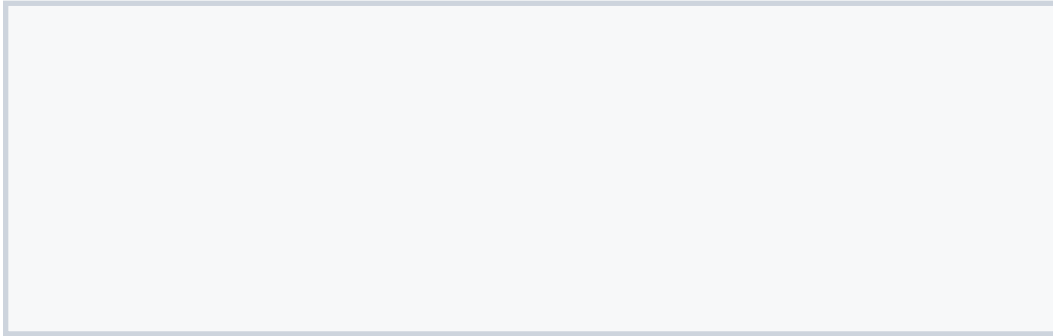
Is it projected to grow in the next five years?

Market Analysis

Customer Data

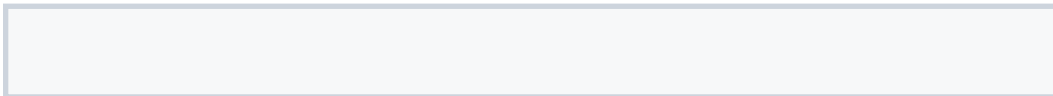
Who is your target customer?

- **Demographics:** Commonly examined demographics include gender, age, ethnicity, knowledge of languages, disabilities, mobility, home ownership, employment status, and even location.^[2]
- **Psychographics:** Psychographics is the study of personality, values, opinions, attitudes, interests, and lifestyles.^[3]

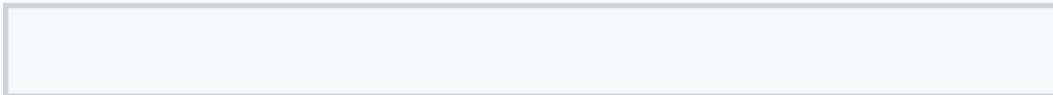


Competitive Data

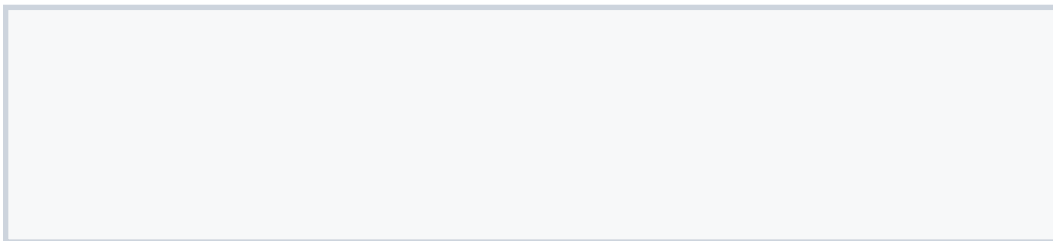
Who are the top five competitors in the market?



Who are the top five competitors in your area?



What is your point of difference vs. your competitors?
In other words, what do you offer that they don't? What do you do better?



Marketing Plan

Where will you be marketing your business?
(i.e. area, country, city, and target market)

How will you be marketing your business?
(i.e. print, digital, outdoor, events)

Describe your overall marketing and sales strategy including how you plan to acquire and retain customers:

Operational Plan

How do you plan to measure the success and performance of your business?

What timelines do you expect to establish and how will you stay on track?

What kind of facility do you need to lease, purchase or build?

How will you get your employees trained and who will be in charge of such training?

Which responsibilities will be delegated to which roles?

Organization Plan

How many employees do you currently have?

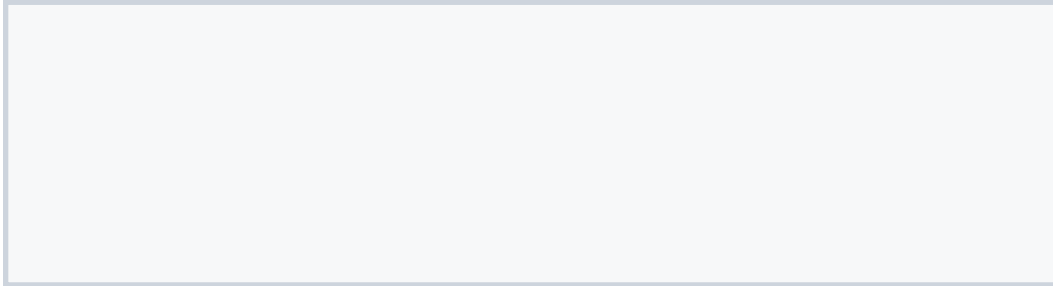
How many do you plan to have in the next year?

Who is your management team?

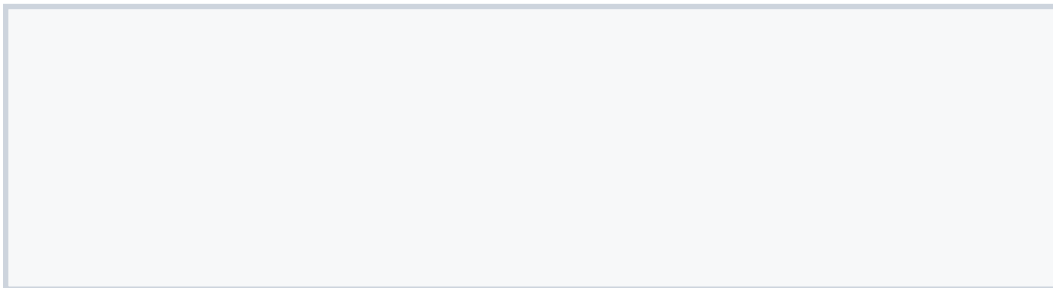
Who will report to whom?

Financial Plan

What kind of capital will be required to get up and running?

A large, empty rectangular box with a light gray border, intended for the user to provide details on the capital required to get the business up and running.

Do you have a budget? How will you track and measure the process?

A large, empty rectangular box with a light gray border, intended for the user to provide details on the budget and how the process will be tracked and measured.

- [1] value proposition - Wikipedia, http://en.wikipedia.org/wiki/Value_proposition
- [2] demographics - Wikipedia, <http://en.wikipedia.org/wiki/Demographics>
- [3] psychographic - Wikipedia, <http://en.wikipedia.org/wiki/Psychographic>

Executive Summary

This is a brief summary of your overall business plan. It should highlight the most important portions of each previous section.

