

2022 Business Plan

“Forget past mistakes. Forget failures.
Forget everything except what you’re going to do now and do it.”

— William Durant, co-founder, General Motors

Executive Summary

Mission Statement

Core Values

Company Description

Company Name: _____
Company Structure: _____
Type of Company: _____
Location(s) of Company: _____

We provide _____ to
_____ in order that they can
_____.

Our ideal client/customer is: _____

_____.

Specific 2022 Objectives

- ❖
- ❖
- ❖
- ❖
- ❖

As a result of the above, as well as effective coordination of the 5 Pillars of Sound Business, we will generate \$_____ in revenue in 2022. We will achieve a profit margin of roughly _____%, which will generate approximately \$_____ in gross profit and \$_____ in net profit.

PILLAR 1: SALES & MARKETING

It is anticipated that the \$ _____ in gross revenue will come from the following products/services:

Offering	Average Value	# of Units Sold	Gross Receipts	Target Monthly Acquisition #

Sales Conversions:

We plan to achieve a conversion rate of _____%, which is defined as new clients/customers obtained divided by sales calls/consultations conducted.

In order to generate _____ new clients in 2022 and assuming a conversion rate of _____%, we will need to generate _____ sales calls (consultations) during the year, or roughly _____ per month.

Since our ratio of consultations to leads is roughly _____% (including no show rate), we will need to generate _____ leads per month or _____ leads per year.

To assist with monitoring outcomes, we will utilize the _____ (system, spreadsheet, etc.), which will be maintained by the _____ (name of position).

Revenue targets:

Q1	Q2	Q3	Q4

Daily	Weekly	Monthly

Based on our projected budget, we will spend a total of \$_____ on marketing efforts in 2022. We will engage in a comprehensive business development strategy using a variety of marketing activities as follows:

Activity	Annual Cost	Annual # of Leads	Conversion Rate	Cost of Acquisition
E.G., Print Ad	\$1000	6	70%	\$238.10

PILLAR 2: HUMAN RESOURCES

Our team will begin 2022 as:

Role	Person	FT	PT	Contract
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

We will hire the following roles in 2022:

Role	FT	PT	Contract
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Current Location of Workforce

The following changes in location of workforce will occur in 2022:

PILLAR 3: PRODUCTION & DELIVERY

The company will be open _____.

Once a client/customer is acquired, the following takes place:

Activity	Role	Timeline	Hand off to	Recorded by
E.G., Schedule Strategy Session	Intake coordinator	1 day from Contract Signing	Attorney	Calendaring Date and Time for All Parties in the MyCase software & Outlook

Once a client/customer has been served (or the product has been delivered), the following takes place:

Activity	Role	Timeline	Hand off to	Recorded by
E.G., Final Invoice Issued	Billing Clerk	Day of Delivery/Completion	Owner once paid	Sending closing letter and paid in full account statement to client

PILLAR 4: MANAGEMENT & OWNERSHIP

Management will attend the following training seminars in 2022:

Management will read the following books on leadership and business development in 2022:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Management will commit to the following personal time off:

1. _____
2. _____
3. _____
4. _____
5. _____

Specifically, my professional goals as the owner are:

1. _____
2. _____
3. _____
4. _____
5. _____

Specifically, my financial goals as the owner are:

1. _____
2. _____
3. _____
4. _____
5. _____

Our business advisors are:

Role	Name	Address	Email	Phone
CPA				
Attorney				
Insurance Broker				
Real Estate Broker				

Our 2022 Organizational Chart is attached as Addendum ____.

PILLAR 5: FINANCIAL CONTROLS

We will review the following reports each month:

1. Budget Variance
2. A/R Report
3. Rolling 12-month expense and revenue report
4. Balance Sheet
5. Cash Flow Analysis

In addition to the above reports, we think it is important to also report on the following items each month:

Based on our 2022 goals, we are anticipating the following increases in our annual budget:

Our 2022 Budget is attached as Addendum ____.