**First Year Business Plan Template**

**My business name is:**

**My website domain is:**

**My business email address is:**

**My business phone number is:**

**The business structure I chose is:**

**I will be / am registered with the following regulatory body:**

**I have my insurance (professional / general liability) with:**

**I have a \_\_\_\_\_\_\_\_\_\_\_\_\_ business license with the Municipality of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Branding**

My 5 Core Business Values are:

1)

2)

3)

4)

5)

My tagline is:

My descriptor is:

My Mission Statement is:

**Services**

The services I offer are:

I will offer them in these formats: (online, face-to-face, groups, workshops)

My current specialties are:

**Clients**

My ideal client is: (give detailed list)

Their biggest problems / pain points are:

How would working with me help them solve this problem?

**Logistics**

My office will be located:

My session length/s will be:

I will offer \_\_\_\_\_\_\_ sessions per day/week/month

I will charge \_\_\_\_\_\_\_\_\_\_ per session

I will accept the following forms of payment (cash, cheque, credit cards, e-transfer, other)

Will I have a sliding scale? Is so, what are the criteria?

My emergency contact for clients is:

My supervisor will be:

**Forms and Policies**

I have the following forms and policies prepared:

* Initial Screening
* Informed Consent
* Intake Form
* Consent to Release Information
* Confirmation of Attendance Letter
* Electronic Communications Policy
* Social Media Policy
* Late Client / Cancellation Policies
* NSF Cheque / Later Payment Policies

**Finances**

**Income Streams:** *Include**other income if any.*

**Future Income Streams:** *Ways you see the practice expanding*

**1)**

**2)**

**3)**

**4)**

**Start up Expenses:** *damage deposit, website design, furniture, head shots etc*

**1)**

**2)**

**3)**

**4)**

**5)**

**Estimated Monthly Income Projections:**

*Include private practice and other income separately*

**Estimated Monthly Operating Costs** (*ex. Rent, phone, internet, webhosting etc*)

**1)**

**2)**

**3)**

**4)**

**5)**

**6)**

Monthly personal living expenses $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly Business Expenses $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Break Even Amount $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly Income Goal $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Current Savings \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How many month’s can you maintain personal and business expenses without private practice income?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Marketing**

**How will people find out about you and your practice?**

*Online and in-person strategies*

**How can you encourage referrals?** *Cross-promotion, speaking, joint ventures etc*

**Who are you planning on reaching out to in order to build your network?**

**Success Metrics -** *I will consider my practice a success when I achieve the following measurable goals:*

\_\_\_\_\_\_\_\_\_ clients per week/month

$\_\_\_\_\_\_\_\_ per week/month

Write \_\_\_\_\_\_\_\_\_ of blogs/articles etc

Other measurable goals \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Self Care**

I will do the following self-care activities:

I will take \_\_\_\_\_\_\_ weeks holidays

**Private Practice Goals for the first year**

**1)**

**2)**

**3)**

**4)**

**5)**

**Private Practice Goals for the next three months**

**1)**

**2)**

**3)**

**4)**

**5)**

**Immediate Priorities**

**1)**

**2)**

**3)**

**Additional Information:**

*Keep this business plan close by and refer to it often to see if you are on track with your goals. Reach out for support from those who can help if you’re stuck. You may be running your own business, but you don’t have to do it all on your own.*