Strategic business development plan tool

The *strategic business development plan* tool will help ensure that your business continues to grow. It is an essential work tool for owner-transferors, successor(s), consultants and financial advisors.

**The purposes of this tool are to help you to:**
- clarify the needs of your business as part of an overall perspective;
- define your visions of the future of the business;
- review the *raison d’être* of your business;
- review the distribution of tasks, roles and responsibilities within the business;
- mobilize employees to share a common vision;
- set business development priorities;
- discuss the future of the business with your successor(s);
- reduce the gaps between your vision of business development and that of your successor(s);
- provide a business development framework.

**Instructions:**
1. Draft the strategic development plan on your own.
2. Ask the people you are considering as potential successor(s) to do the same exercise.
3. Individually determine the financial resources required by the development plan.
4. Share your respective plans.
5. Make a list of priorities based on your discussions.
6. Implement a follow-up schedule.
7. Review this plan as often as possible.
Strategic business development plan

**Business vision**  
What will the business look like in five years?  
Sales figure:  
Location:  
Number of employees:  
Positioning:  
Other aspects:  

**Business mission**  
Why does the business exist?  
What are its *raison d’être* and its contribution to society?  
The mission of the business is:  

**Values**  
Which behaviours and attitudes does the business promote?  
The values are:  

Strategic business development plan

**Farm’s production structure**

Land and buildings: ________________________________________________________________

_____________________________________________________________________________

Machines and equipment: __________________________________________________________

_____________________________________________________________________________

Herd: _________________________________________________________________________

_____________________________________________________________________________

Production quota: _______________________________________________________________

_____________________________________________________________________________

**Products or services**

Which are offered to clients?

Products: ____________________________________________________________________

_____________________________________________________________________________

Services: ____________________________________________________________________

_____________________________________________________________________________

**Products or services**

Which are offered to business partners?

Products: ____________________________________________________________________

_____________________________________________________________________________

Services: ____________________________________________________________________

_____________________________________________________________________________
Strategic business development plan

Work organization
How are tasks divided among shareholders (who does what)?

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<th>NAME</th>
<th>POSITIONS</th>
<th>ROLES AND RESPONSIBILITIES</th>
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How are tasks divided among employees (who does what)?

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<th>NAME</th>
<th>POSITIONS (seasonal employee, permanent employee, etc.)</th>
<th>ROLES AND RESPONSIBILITIES</th>
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Strategic business development plan

Target market
What is the profile of the target clientele?

Description: __________________________________________________________________________
_____________________________________________________________________________________
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Clientele
Who are the main clients?

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<th>MAIN CLIENTS</th>
<th>NEEDS IN TERMS OF PRODUCTS OR SERVICES</th>
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Geographical distribution
Local: __________________________________________________________________________
Regional: _______________________________________________________________________
Provincial: _____________________________________________________________________
National: ______________________________________________________________________
U.S.: _________________________________________________________________________
International: __________________________________________________________________

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Strengths
What sets this business apart (internally and externally) and enables it to maintain its positioning?
Distinguishing strengths (internal and external):

Weaknesses
What are the weaknesses of the business (internal and external)?
Weaknesses, internal and external:

Business opportunities
Current or foreseeable business opportunities (market, competition, etc.)?
Opportunities identified:
Strategic business development plan

**Threats**
What are the existing or foreseeable threats in the business environment (workforce, competitor, currency fluctuations, etc.)?

Threats identified: __________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**Trends**
What trends appear to be gaining ground and will require follow-up or adjustment?
What trends could the business set?

Opportunities identified: ______________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
PRIORITIES STEMMING FROM THE STRATEGIC PLAN

Taking into account the preceding statements, what priorities are key to the development of the business:

Priorities:
1. 
2. 
3. 
4. 
5. 

Timeline for achieving these priorities and the person responsible for the follow-up

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<tr>
<th>PRIORITY</th>
<th>TARGET DATE</th>
<th>PERSON IN CHARGE</th>
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