

Transferência de Tecnologia e Conhecimento

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Créditos/Horas de Contacto: 6ECTS; 45 horas TP + 5 horas OT

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EXECUTIVE SUMMARY & BUSINESS PLAN SUPPORT INFO

Typical structure examples

A Business plan may vary in its presentation but its main structural points are kept in all examples. It must include:

- executive summary
- The problem
- The solution
- Market & Customer segments & competition
- How you will implement it
- What do you need to implement it (operational and financial)

Next some examples are provided just as inspiration.

EXECUTIVE SUMMARY

How to Write an Executive Summary

	Purpose	Questions to ask
Bullet 1: The Pitch	<ul style="list-style-type: none"> Sell yourself in a sentence Highlight a characteristic, role, skillset and specialty 	<ul style="list-style-type: none"> What is the one thing the hiring manager should know about you? How would you describe yourself in a sentence? What would you say about yourself in a job interview?
Bullets 2-3: The Skills	<ul style="list-style-type: none"> Emphasize most relevant skills tailored to job description Include particularly relevant experiences 	<ul style="list-style-type: none"> What are the most relevant skills you have? What makes you uniquely qualified for this position? What makes you different than other PhDs with similar backgrounds?
Bullets 4-5: The Fit	<ul style="list-style-type: none"> Describe soft skills relevant to job Show who you are as a person Convey anything else impressive 	<ul style="list-style-type: none"> How would your colleagues and friends describe you? What adjectives would they use? What is it like working with you? What accomplishment you are most proud of? How would you fit in on a team at the company you are applying to?



Example 1 – EXECUTIVE SUMMARY

A good business plan always requires a good Executive Summary, and a solid Executive Summary can also serve as a quick pitch to a potential investor.

Executive Summary Template

[The Company] was founded in [year] and [describe what your business does or its principal mission or objective. For example “and is a growing manufacturer of pencil lead”]. Our principal offices are located in [x].

Business/Product or Service

[The Company] makes [describe your product/service line].

The Company produces/provides the following products/services: [list products here in order of significance].

Presently, our [main product] is in the [pick one of: introductory, growth, maturity] stage. It competes primarily based on [competitive advantage]. Our future plans include developing [x, y, and z] in [year or timeframe].

The Market

We define our market as [define market. e.g. women’s athletic apparel, kitchen appliances, small business software]. The total market size was approximately [\$x] last [period available], and is expected to grow by [x%] by [year]. We currently hold [y%] of this market and believe we can capture [z%] of it by [year]. Some of our most notable customers include [examples of customers].

Competition

We compete directly with [x and y] and alternatives to our product include [u and v]. Our product is unique/superior because of [x]. We have a competitive advantage because of our [speed to market, established brand name, low cost producer status]. We [anticipate / do not anticipate] new companies to enter this market.

Risk/Opportunity

The greatest risks associated with our business today are [x, y, and z]. We feel we can overcome these risks because of [m]. Our biggest recognized opportunities include [a, b, c]

Management Team

The management team is led by Chief Executive Officer [Name of CEO] who [founded the company in (year) / joined the company after working as (position) at (company)]. [Add any relevant previous work experience]. [Add education. e.g. “She received her M.B.A. from the University of Iowa in 2002”]

The [title of position] is [name of position holder], [Add relevant work experience and education]

The [title of position] is [name of position holder], [Add relevant work experience and education]

The [title of position] is [name of position holder], [Add relevant work experience and education]

Operations

We have [manufacturing facilities / offices / branches] located in [location, location, location]. We currently perform [u] in house, while outsourcing [v]. Our total full time staff is [15 people] and our products are distributed by [method or distributor]

Capital Requirements

We are seeking [\$] which will enable us to [describe what you will accomplish with the funds] by [describe how the funds will be spent]. We expect to provide an exit within [x] years by [a dividend of excess profits, recapitalization, sale of company, or public offering].

Financial Snapshot

Example 2 – EXECUTIVE SUMMARY

EXECUTIVE SUMMARY TEMPLATE

Company Name Here

Mission: Write here a mission line

Business Description: General nature of your company. By this section the stakeholders and reviewers must be persuaded of the uniqueness of your company and must gain an apparent idea of the market in which the company will be operated.

Company Background: A short summary of your company's background will be described under this section.

Products/Services: Write here briefly about products and services that will be offered by your company. Also provide here potential benefits for the company.

Technologies: Describe here what technologies will be used to entry for potential competitors.

Markets: A clear description of your target market along with market segments that may exist within that market will be provided here. Market size and growth rate should also be included along with this information. You can describe here your revenue models as well.

Distribution Channels: Point out which channels will be used to deliver your products/service to your target markets this will include:

- Systems integrators
- Independent software vendors
- Partner offerings
- Direct sales force
- Channel partner

Competition: Describe here any current or potential direct and indirect competition. State here competitive outlook and dynamics of the relevant market in which you will operate.

Financial Projections:

	FY 2009	FY 2010	FY 2011	FY 2012
Revenue				
Operating Income				

Solution Management:

- CEO
- CTO
- Finance
- Marketing
- Product Development etc...

Industry: i.e. Data Management

Number of Employees:

Financing Sought: \$2M

Use of Funds: i.e. Product development, marketing/sales, distribution, etc...

Checked By: _____

Approved By: _____



Exemple 3: EXECUTIVE SUMMARY

NAME OF STARTUP

One-line pitch: XXXXXXXX

Management team

WHO WILL LEAD THIS?

Other members: XXXXX

Customer problem

WHAT PROBLEM ARE YOU TRYING TO SOLVE?

Product/Services

WHAT SOLUTION ARE YOU PROVIDING?

x

LOGO HERE

Company profile

URL:

Video:

Industry:

Nr-of-Employees:

Founded (date):

Contact:

Location

Financial information (€)

Company · Stage: · Early-
stage/Seed/series-A, B, C

Monthly Net Burn:

Pre-money Valuation:

Capital Seeking:

Target market: WHICH MARKET, WHERE?

Customers: Attributes of your customers.

Sales/Marketing strategy: HOW WILL YOU LAUNCH & GROW?

Business model: What is your Business Model and how will it work?

Competitors: XXXXXX

Competitive advantage: XXXXX

What have you done so far: XXXXXXXX



Example 1: Business Plan



STRATEGIC BUSINESS PLAN OUTLINE

This outline is from the same source as Strategic Plan Format #3 but is much more comprehensive and one could argue it is more of a business plan than a straight forward pithy strategic plan. Either way, if you complete this for your business you will be well on the way to a planned outcome, rather than *being an accident going somewhere to happen!*

1. EXECUTIVE SUMMARY (a concise 1-2 page overview)

2. THE COMPANY

- A. Mission Statement
- B. Corporate Culture (Guiding Principles)
- C. Historical Direction & Results
- D. Management

3. SITUATIONAL (SWOT) ANALYSIS

- A. Strengths
- B. Weaknesses
- C. Opportunities
- D. Threats

4. MARKET RESEARCH

- A. Competition
- B. Clients
- C. Other

5. MARKETING GOALS (must be measurable)

- A. Consumer Awareness
- B. Market Share
- C. Diversification
- D. Channels of distribution (for your services & products)
- E. Other

6. SERVICE (PRODUCT) DEVELOPMENT

- A. Descriptions of Services & Products to be Offered
- C. Pricing
- D. Delivery Systems
- E. Delivery Capability
- F. Suppliers of Critical Elements

7. MARKETING PLAN

- A. Strategies & Tactics
- B. Client Segmentation
- C. Positioning

Example 2



THE BUSINESS PLAN

BUSINESS PLAN OUTLINE

Below is an outline for a business plan. Use this model as a guide when developing the business plan for your business.

Elements of a Business Plan

1. Cover sheet
2. Statement of purpose
3. Table of contents

I. The Business

- A. Description of business
- B. Marketing
- C. Competition
- D. Operating procedures
- E. Personnel
- F. Business insurance
- G. Financial data

II. Financial Data

- A. Loan applications
- B. Capital equipment and supply list
- C. Balance sheet
- D. Breakeven analysis
- E. Pro-forma income projections (profit & loss statements)
 - Three-year summary
 - Detail by month, first year
 - Detail by quarters, second and third years
 - Assumptions upon which projections were based
- F. Pro-forma cash flow
 - Follow guidelines for letter E.

III. Supporting Documents

- Tax returns of principals for last three years
- Personal financial statement (all banks have these forms)
- In the case of a franchised business, a copy of franchise contract and all supporting documents provided by the franchisor
- Copy of proposed lease or purchase agreement for building space
- Copy of licenses and other legal documents
- Copy of resumes of all principals
- Copies of letters of intent from suppliers, etc.

More information:

<http://articles.bplans.com/a-standard-business-plan-outline/>