



# **BUSINESS PLAN INTRODUCTION**

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## INTRODUCTION TO THE BUSINESS PLAN TEMPLATE

This business plan template is designed to guide you through the essential components of launching and managing a successful business. It serves as a comprehensive roadmap, outlining your company's objectives, strategies, and operational plans. Whether aligning your team, or setting a clear direction for growth, this template provides a structured approach to articulate your vision and plan effectively.

### Purpose of the Business Plan

The primary purpose of this business plan is to provide a clear and concise framework for your business operations and strategy. It helps in communicating your business idea, understanding market dynamics, planning organisational structure, and projecting financial outcomes. A well-crafted business plan is crucial for attracting investors, securing loans, and guiding internal decision-making processes.

### Structure of the Template

The template is organised into the following sections:

1. **Executive Summary:** An overview of your business, including mission statement, product or service offerings, and basic information about leadership, employees, and location.
2. **Staffing Plan:** Details about your organisational structure, staffing requirements, and human resource strategies.
3. **Finance Department:** Information on financial management, including finance controls.
4. **Support Staff (Optional):** Outline of additional personnel who support core operations, such as administrative assistants or IT support.
5. **Inventory Management:** Strategies for managing inventory, supply chain logistics, and procurement processes.
6. **Sales Strategy:** Plans for sales operations, including sales processes, team structure, and sales targets.
7. **Customer Retention:** Approaches to maintain and enhance customer relationships, loyalty programs, and customer service policies.
8. **Monitoring and Evaluation:** Methods for tracking performance, evaluating outcomes, and implementing improvements.
9. **Financial Projections:** Forecasts of revenue, expenses, cash flow, and profitability over a specified period.

### Utilising the Template

Each section of this template is designed to prompt critical thinking and detailed planning. By thoroughly completing each part, you will develop a comprehensive understanding of your business and its potential challenges and opportunities. This structured approach ensures that all vital aspects of your business are considered and addressed.

Remember, a business plan is a living document. Regularly revisiting and updating your plan is essential as your business evolves and market conditions change. This practice will help you stay aligned with your goals and adapt strategies as needed.

Embark on this planning journey with clarity and purpose, using this template as a foundation to build a resilient and successful business.

## CAR SALES DEPARTMENT BUSINESS PLAN TEMPLATE

### 1. Executive Summary

Suggestions	Your dealership
<b>Mission statement</b>	
<b>Objective:</b> Achieve consistent sales of 50 vehicles per month.	
<b>Scope:</b> Oversee new and used car sales, manage inventory, and lead the sales team to meet performance targets.	
<b>Timeline:</b> Implement strategies over the next 12 months with quarterly evaluations.	

### 2. Staffing Plan

Suggestions	Your dealership
<b>Sales Team</b> <ul style="list-style-type: none"> <li><b>Required Salespeople:</b> To sell 50 cars monthly, and assuming an average salesperson sells 15 cars per month, you'll need:  <math>50 \text{ cars} \div 15 \text{ cars per salesperson} = 3</math> additional sales from manager = <b>3 salespeople</b></li> </ul>	
<b>Sales Manager:</b> Oversees the sales team, sets goals, and monitors performance, manages inventory.	
<b>Sales Consultants (3):</b> Engage with customers, conduct test drives, and close sales. Deliver vehicles. Follow up and create new business.	

### 3. Finance Department

Suggestions	Your dealership
<b>Finance Managers:</b> Typically, one finance manager can handle affectively 35 – 45 deals per month.	

### 4. Support Staff (Optional)

Suggestions	Your dealership
Groomers, delivery coordinator, goffer	

### 5. Inventory Management

Suggestions	Your dealership
<b>Stock Levels:</b> Maintain an inventory turnover ratio of 2, meaning stock sufficient for two months: 50 cars/month × 2 months = <b>100 vehicles in stock</b>	
<b>Vehicle Mix:</b> subject to brand and locality <ul style="list-style-type: none"> <li>○ 50% New Cars</li> <li>○ 50% Used Cars</li> </ul>	
<b>Sourcing:</b> <b>New Cars:</b> Directly from manufacturers. <b>Used Cars:</b> Trade-ins, auctions, and certified pre-owned programs.	

## 6. Sales Strategy

### Lead Generation

Suggestions	Your dealership
<b>Digital Marketing:</b> Invest in SEO, pay-per-click advertising, and social media campaigns to online traffic.	
<b>Community Engagement:</b> Participate in local events and sponsor community programs to increase brand visibility.	
<b>Referral Program:</b> Implement a customer referral program offering incentives for successful referrals.	

### Sales process

Suggestions	Your dealership
<b>R2TS process and follow up strategies:</b> documented sales strategy including test drives and dealing with the trade.	
<b>Customer Relationship Management (CRM):</b> Utilise a CRM system to track leads, follow-ups, and customer interactions.	
<b>Training:</b> Provide ongoing training for the sales team on product knowledge, customer service, and closing techniques.	
<b>Performance Metrics:</b> Monitor key performance indicators (KPIs) such as conversion rates, average deal size, and customer satisfaction scores.	

## 7. Customer retention

Suggestions	Your dealership
<b>After-Sales Service:</b> Offer maintenance packages and regular service reminders.	
<b>Loyalty Programs:</b> Introduce programs that reward repeat customers with discounts or exclusive offers.	

## 8. Monitoring and Evaluation

Suggestions	Your dealership
<b>Weekly Meetings:</b> Review sales performance, discuss challenges, and adjust strategies as needed.	
<b>Monthly Reports:</b> Analyse sales data, customer feedback, and financial performance.	
<b>Quarterly Reviews:</b> Evaluate overall progress towards annual goals and make strategic adjustments.	

## 9. Financial Projections

Suggestions	Your dealership	
Monthly Sales Target:	NEW	
	USED	
Average Gross Profit per Vehicle: Estimate based on historical data and market trends.	NEW	
	USED	
Monthly Gross Profit: Number of vehicles × Average Gross Profit.		
Finance profit		
Operating Expenses: Include salaries, marketing, utilities, and other overheads.  Net Profit: Monthly Gross Profit - Operating Expenses.		

This business plan serves as a roadmap only and an opportunity to develop your plan for achieving your monthly sales target of \_\_\_\_\_ vehicles. Regular monitoring and flexibility to adapt strategies will be key to sustained success.



"As you step into your new role, remember: leadership is not about having all the answers, but about asking the right questions, listening with intent, and guiding your team toward shared success.

It starts with planning followed by doing.

The business plan is your opportunity to set the tone, build trust, and lay the foundation for a thriving team. Embrace the journey ahead with confidence and purpose."

This closing statement encapsulates the essence of your transition into leadership, emphasising the importance of planning the work and working the plan.

It serves as a motivational conclusion to your course, inspiring you to approach your new role with confidence and intentionality.



## ABOUT US

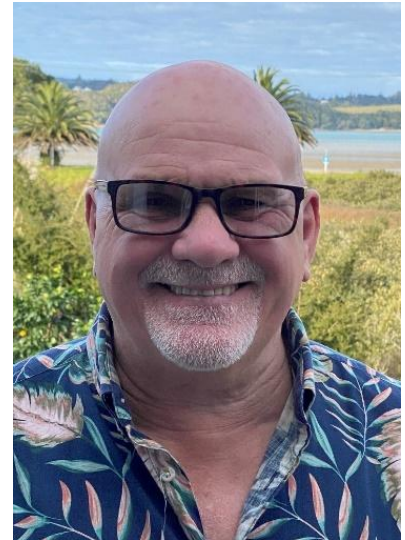
Graham (GTE) leads over 100 workshops annually, focusing on leadership, sales, fixed operations, and customer experience. He's the founder of Success Resources International, a Registered Training Organisation based in Brisbane, and the Managing Director of GTE Training and Development in New Zealand.

Originally from North Wales, Graham has spent 17 years in Australia (2001 – 2019) after more than two decades in New Zealand. His background includes service in both the Royal Navy and the Royal New Zealand Navy.

He's married to Shelley, a Kiwi from the Bay of Islands, and together they have two children Mackenzie and Gareth, along with four grandchildren: Hudson, Avyana, Reo and Vivienne.

Graham (GT) is a highly regarded coach and workshop facilitator specialising in leadership, sales, service and customer experience. He brings a wealth of expertise with the following qualifications:

- Advanced Diploma of Leadership and Management
- Diploma in Automotive Management
- Diploma of Training and Education and Design
- Certificate IV in Finance and Mortgage Broking
- Certificate IV in Business Sales
- New Zealand Certificate in Marketing
- NLP Practitioner



GRAHAM TAYLOR-EDWARDS