

4.1 How to Create a Business Plan



Part 1 - Theory

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What is a Business Plan?

The **Business Plan** is a document that describes a business project: its goals, marketing and business strategy, and financial plan.

It is a document consisting of two parts:

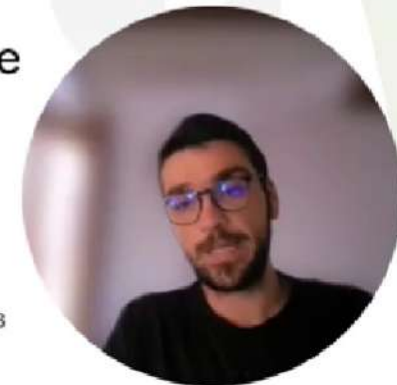
Descriptive part: here you provide a complete overview of your project, describing its market, competitor analysis and marketing strategies;

Numerical part: in this section, you describe the financial aspects of your project, presenting the investment plan, projected budget and sales forecast



Why write a business plan?

- **Describe the business idea:** allows you to present your idea clearly and in detail, demonstrating its feasibility and potential;
- **Set the business strategy:** you will be able to define the strategies, the actions to be taken and the resources needed to achieve the goals;
- **Evaluate the progress of the project:** allows you to monitor your activity over time, comparing the results with the predictions made in the initial plan;
- **Presenting your company or project to potential investors/funds:** this is a key tool for convincing potential investors and/or obtaining public funds of the validity of your project;



Structure: the 8 fundamental pillars

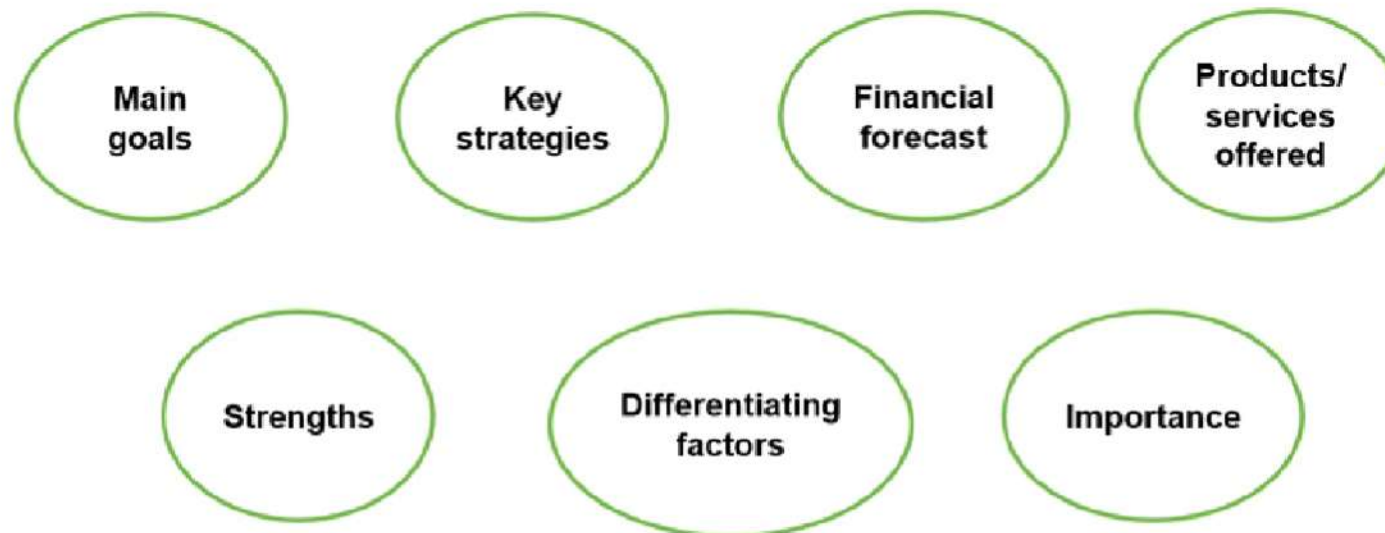
An effective business plan always touches on eight key areas. They don't all have to be very long, but they must be there:

- A clear and engaging **Executive Summary**;
- **The Business Description**: what you do, for whom, why you exist;
- **The Market Analysis**: who are the customers and the competition;
- **Your Business Model**: how you make money;
- **The Operational Plan**: how you're going to make it all work concretely;
- **The Marketing and Sales Plan**: how you will find and convince customers;
- **The Team**: who works on it and what skills they bring;
- **Financial Projections**: realistic economic forecasts.



L'Executive Summary

The Executive Summary is a concise and persuasive summary of your Business Plan. In this one you must capture the reader's attention and clearly and effectively communicate the key points of your business plan:



Business description

A **detailed description** of the company/project is provided at this stage. The company's **vision** and **mission** are described, the **goals** we set out to achieve and **how we are going to achieve** them are described, and the **products** or **services** we offer and the **need we are going to meet** in the marketplace are described



MISSION



VISION



VALUES



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Market analysis

1. **Market description:** dimension, trend, context
2. **Customer analysis:** Who are our ideal customers? What needs do they have? How do they buy today? What problems can we solve for them?
3. **Competitive Analysis:** Who are the direct and indirect competitors? What do they offer? What are their strengths and weaknesses? How are we different or better?
4. **Opportunities and Threats:** Positive trends, new customer needs, public incentives; New competitors, changes in law, logistical difficulties.



Business model

At this stage, the business model is described. The products and services offered by the company are then described, how they are produced, and how they are sold and distributed.



Is a very important step because you describe the economic sustainability of your business: what resources you use and what revenues you generate

Revenue Streams



Key Activities



Key Resources



Channels



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Operational plan

The operations plan tells how the company will function in practice, every day. It shows that you have thought concretely about how to put the plan in place: what activities you will do, with what resources, and with what tools.



Location



Product and services



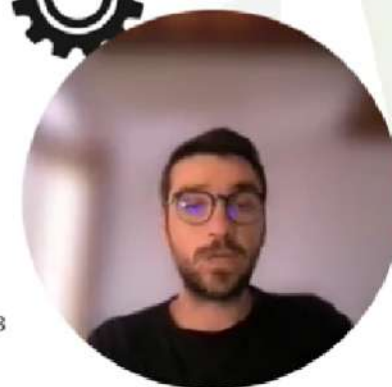
Resources



Team



Process



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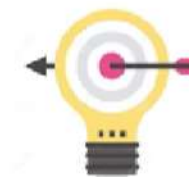
Marketing and sales

Marketing Strategy: How will you let people know you exist? What tools will you use to make yourself known? What values do you want to communicate (e.g., sustainability, social inclusion)?

Communication tools and channels: What media will you use? Social media, Website Newsletter, Participation in fairs, local events Collaborations with schools, cooperatives, public agencies

Sales strategy: How will sales take place concretely? Local markets, Weekly subscriptions (farm boxes), Direct farm sales Proposals to schools for social activities

Positioning: How do you differentiate yourself from the competition? What is your "unique message"?



Team: organization and management

Who manages the company, how the roles are divided and what skills they have



Organizational structure

Who does what? How are the main roles divided (production, marketing, sales, educational, administrative)?

Who are the key people?

Founders and key figures. Brief description of their skills

External collaborators (if any):

Will you have consultants?
Collaborations with public agencies?
Social cooperatives?

Coordination mechanisms

How will contacts be kept (weekly meetings, reports, management tools)?



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Business and financial plan

Initial investment: What do you need to buy to get started? (machinery, equipment, renovations) How much does everything cost?

Annual operating costs: Personnel, seeds, water, energy, insurance, marketing...

Revenue forecast: Where does the money come from? (products, services, contributions) How much do you expect to collect in the first, second, and third years?

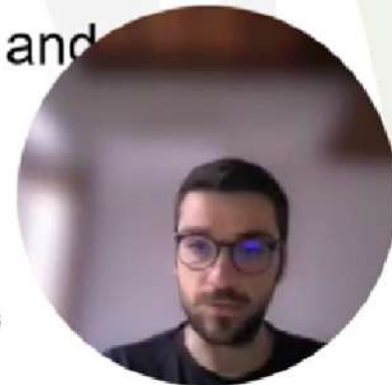
Break-even point: When do you think revenues will cover costs?

Possible sources of funding: Do you use public funds? Bank financing? Private investment?



L'Executive Summary

The project SF is a social farming project that combines inclusion, sustainability, and agricultural production. It aims to involve vulnerable individuals—especially young people with disabilities and those in social reintegration—through farming activities, promoting well-being, autonomy, and employability. The project includes the cultivation of organic vegetables and direct sales through weekly farm boxes and local markets.



Business description

The project will be implemented by a social cooperative located in a peri-urban area.

Mission: To provide opportunities for social and work inclusion through agricultural work.

Vision: To become a local benchmark for social farming, combining social impact with environmental sustainability.

Products/Services: Organic vegetables, weekly farm boxes, educational workshops for schools, open farm days.



Market analysis

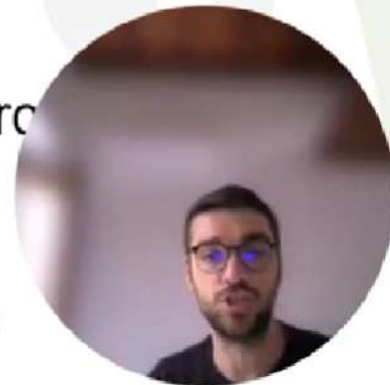
Market Overview: Growing demand for organic and locally-sourced products.

Target Customers: Families, solidarity purchasing groups (GAS), schools, local institutions.

Competitors: Traditional farms, organic supermarkets, other social farms.

Opportunities: Increasing interest in sustainable food, public funding, partnerships with municipalities.

Threats: Climate unpredictability, bureaucracy, limited stable workforce





Business model

Revenue will come from:

Direct sale of vegetables (markets, weekly boxes, farm shop)

Educational and social services (workshops, school visits)

Public contributions and grants



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Operational plan

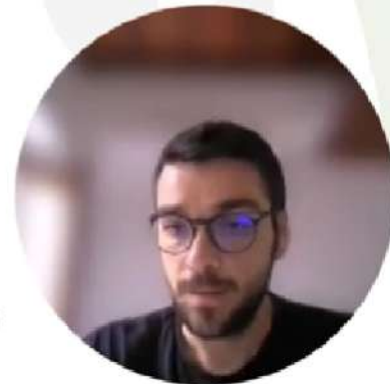
Land: 2 hectares of cultivable land

Crops: Seasonal vegetables, aromatic herbs

Staff: 1 agronomist, 1 educator, 3 social workers, 5 beneficiaries/workers

Infrastructure: Greenhouse, irrigation system, small warehouse

Weekly Activities: Cultivation, harvesting, packaging, delivery





Marketing and sales

Promotion Channels: Social media, website, local events, partnerships with schools and municipalities

Sales Strategy:

- Weekly farm boxes by subscription
- Farmers' markets
- Direct sales at the farm
- Educational packages for schools

Key Values: Sustainability, social inclusion, short food supply chain





Team: organization and management

Project Manager: Oversees all activities

Agronomist: Leads agricultural production

Professional Educator: Supports individualized inclusion paths

Volunteers: Assist with logistics and activities

Beneficiaries: Involved through training programs or supported internships



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Business and financial plan

Initial Investment (estimated): €45,000

Greenhouse and equipment: €15,000

Irrigation and facility improvements: €10,000

Launch and communication costs: €5,000

Training and first year staff: €15,000

Annual Operating Costs (estimated): €30,000

Staff, seeds, materials, transport, utilities

Revenue Forecast: Year 1: €20,000 Year 2: €35,000

Year 3: €45,000

Break-even Point: Expected during the second year.

Funding Sources: Rural Development Programs
(CAP/PSR), National Recovery and Resilience Plan
(NRRP) Local public funding or foundations

Crowdfunding campaign

Possible micro-loan or ethical banking support



Business and financial plan

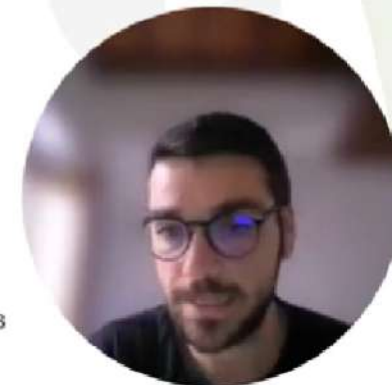
Item	Year 1 (€)	Year 2 (€)
Income		
Vegetable sales	20,000	30,000
Workshops & education	5,000	8,000
Public grants/funding	30,000	15,000
Total income	55,000	53,000
Expenditure		
Staff (2 operators)	25,000	28,000
Equipment & machinery	10,000	2,000
Production materials	5,000	5,000
Training & support	5,000	5,000
Overheads & promotion	5,000	5,000
Total expenses	50,000	45,000
Expected profit	5,000	8,000



Thank you for the attention!

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