

Organizations Name

Year of Plan

Preliminary Business Plan

Basic Management 101

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- a. **Budgetary**
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1. **Executive Summary**

Develop & Fill in...

2. **Introduction**

a. **Business Plan.** Develop & Fill in...

b. **Plan's Objectives.** Develop & Fill in...

3. **Major Facts and Assumptions**

a. **Presumed Facts.** (*Note:* These are the facts as perceived management)

(1)

b. **Assumptions.** (*Note:* Any planning process creates assumptions upon which certain goals, objectives, and actions are formulated. Assumptions, which are key to the plan, should be stated and contingency steps should be formulated for assumptions that may lack validity):

(1) The mission of

4. **Philosophy** (*Note:* This is a set of basic beliefs, which establishes parameters for a business and its personnel. It is a statement of what we will and won't do).

a. **Why are we in business?**

b. **How do we do business?**

Our Operating Principles:

- Customer Focus
- Committed leaders
- Organized teamwork
- Strong learning ethic
- Open, honest communication
- Dignity and respect in all relations
- Caring and concern for all
- Excellence in resource stewardship
- Data-driven information community decision makers

c. **Vision Statement**

d. Mission

(2) Specific Mission Requirements:

(a)

e. Methodology to accomplish the Vision

In order to attain the Vision and Guiding Principles of the...

f. Objectives

- (1) Leadership
- (2) Strategic Planning
- (3) Customer Focus
- (4) Information Analysis
- (5) Human Resource Development and Management
- (6) Business Process Management
- (7) Performance Improvement

g. Objectives Defined:

(1) **Leadership.**

(2) **Strategic Planning.** (*Example:* Determine if contracts for services can be combined to establish economy of scale using good business practice techniques).

(3) **Customer Focus.** (i.e. Membership)

(4) **Information Analysis.** To examine the effectiveness of the use of data to support key management systems.

(5) **Human Resource Development and Management.** To examine how the work force is best enabled to develop and utilize its full potential while aligned with the organization's objectives. Also, to examine the organization's efforts to build and maintain an environment which is conducive to performance excellence, full participation, and personal and organizational growth.

(6) **Business Process Management.** To examine key aspects of process management, to include: customer-focused design; product and service delivery processes; support processes; supplier and partnering processes involving all work units within the healthcare environment.

(7) **Performance Improvement.** To ways to improve in key business areas to include: customer satisfaction; financial and marketplace performance; human resources; supplier and partner performance; operational performance.

5. Budget & Financial Plan.

a. Income/Revenue/Budget Allocation

6. Tactics and Actions. The information that follows depicts the Operating Plan for the next 12 to 24 months based on realistic objectives.

a. Human Resource Plan

b. Newsletter and Web Site Committee Objectives

c. Social Committee Objectives

d.....

7. Snapshot of Business Processes

a. Budgetary Benchmarks

b. Expenditure Benchmarks

c. ? Benchmarks

d. Productivity Benchmarks

8. Benchmark Charts

a. Budgetary

b. Productivity

If you require advanced Business Plan Assistance
Please try www.mcclainconcepts.com.