Community Business Bureau

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# Business Plan template

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# Action plan

This simple action plan is designed to help you capture key tasks to develop your business plan and set up your new service. Key areas to cover include:

* What research you need to do
* Who you need to talk to
* What actions to take
* What decisions to make

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action area** | **Brief description** | **Who is accountable** | **Deadline** | **Progress** |
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# Section 1: Executive summary

The NDIS Success program aims to increase the supply of NDIS services in communities, with a particular focus on regional, rural and remote communities and Aboriginal and Torres Strait Islander communities. The program is delivered in two parts:

1. **NDIS Success Roadmap**: this is an online program that is available to anyone interested in developing – or growing – their NDIS service. It is designed to help organisations and individuals to develop a business plan for an NDIS service.
2. **NDIS Success Guide**: organisations can apply for one to one business consulting support to help them to set up a pilot for a new NDIS service. You will be able to apply for this support through a competitive process. Support will be prioritised for regional, rural and remote and Aboriginal and Torres Strait Islander organisations operating in South Australia, Western Australia, the Northern Territory and Queensland.

NDIS Success Roadmap: Program structure and content

This is an online program. It is open to individuals and organisations and it is free to participate. The program takes place over a 12 week period and by the end of the 12 weeks you should have access to the information and tools to develop your NDIS business plan. The program is structured in two streams – one for managers and business owners; and one for the governing bodies of not for profit organisations (your board or management committee).

The program includes:

|  |  |
| --- | --- |
| **Online resources** | Downloadable resources, including activity worksheets, tools, templates and information and links to online content |
| **Webinars** | Management series: a series of six, pre-recorded webinars  Governance series: a series of two, pre-recorded webinars  You will receive an update when new webinars are released and you can watch these at a time that suits you. |
| **Q&A sessions** | Management series: a series of six pre-recorded Q&A sessions with our business consultants  Governance series: a series of two pre-recorded Q&A sessions with our business consultants  Each Q&A session will be related to a webinar topic and will take place a week after the webinar has been released. You will be able to post your questions to us in advance on our [LinkedIn forum](https://www.linkedin.com/groups/12363931/). |
| **NDIS Success LinkedIn forum** | This is an online forum for you to network with your peers who are also taking part in the program, ask questions of each other and share learnings and reflections. |

At the end of the Roadmap you will have:

* a framework for your business plan
* templates to support you in planning key aspects of your NDIS service – including building your project budget
* access to information sources that will support you in planning your NDIS service

You will also have developed your skills and experience in business planning.

Who should be involved?

### Management series

The management series is suitable for:

* CEOs, general managers and other senior staff within organisations
* Client service managers
* Business owners

You are welcome to involve other members of your team. We recommend a minimum of two people from your organisation.

### Governance series

The governance series is suitable for the board and committee members of organisations, particularly not for profit organisations.

Timeline

NDIS Success Roadmap will start in August 2020. We will work with you over a 12 week period.

# Section 2: Welcome

Introduction

The team at CBB are looking forward to working with you.

NDIS Success Roadmap has been designed as a program to support organisations to build their capacity to deliver or grow an NDIS service. The program is being delivered in two stages:

1. **NDIS Success Roadmap**: this is an online program that is available to anyone interested in developing – or growing – their NDIS service. It is designed to help organisations and individuals to develop a business plan for an NDIS service. The online program runs for 12 weeks.
2. **NDIS Success Guide**: organisations can apply for one to one business consulting support to help them to set up a pilot for a new NDIS service. You will be able to apply for this support through a competitive process. Support will be prioritised for regional, rural and remote and Aboriginal and Torres Strait Islander organisations operating in South Australia, Western Australia, the Northern Territory and Queensland.

The whole program will be delivered twice, between April 2020 and June 2021.

This program is funded by the Australian Government Department of Social Services.CBB’s Community Development Fund is also contributing funds to the program. It is free for participating organisations.

Our objectives

CBB is a not for profit social enterprise with a commitment to build the business capability of the not for profit sector. Our objectives in working with you under the NDIS Success program are to:

* build your organisational or individual capacity in business planning
* build your understanding of the NDIS operating environment

and, ultimately,

* to increase the supply of quality services that meet the needs of people with disabilities within their communities, particularly in regional, rural and remote communities, and for Aboriginal and Torres Strait Islander people with disabilities

Scope of NDIS Success Roadmap (online program)

The NDIS Success Roadmap is focused on providing you with access to information and resources to build your understanding of the NDIS and your skills in developing a business plan to start or scale an NDIS service. The Roadmap will take you through the key activities you will need to develop a business plan for your NDIS service, and provide you with tools and guidance. However, within the scope of this program, we will not have time to work in detail in each of the areas covered.

We will support you with information, tools, templates and access to a network of your peers, while you and your team do the work of developing your service. We encourage you to complete the activities and undertake further self-directed learning, in order to maximise the value of the program.

CBB does provide fee for service consulting for not for profit organisations and organisations working in community services. If you would like to work with a CBB consultant on areas outside of the NDIS Success program, we can provide you with a fully costed proposal based on an agreed scope of services.

Using this business plan template

The webinars in the NDIS Success Roadmap will guide you through the information and activities that you will need to develop your business plan. This document is designed to accompany the webinars, Q&A sessions and other online resources. You will get most value from the program by:

* Reading this document and watching all the webinars and Q&A sessions
* Working through the activity worksheets with your colleagues after each webinar, and looking up additional online content and information. You can stop and start the webinars, and re-watch the webinars, if you need more time to understand the information.
* Posting your questions on the LinkedIn NDIS Success forum
* Completing each section of this business plan template as you work through the program.

Once you have completed this business plan template and the exercises in the activity worksheets, you should have most of the information you need to support you in developing or growing your NDIS service. You should expect that you will need to do further work to get your service up and running, and to maintain and grow your NDIS business moving forward.

This template is presented in the following sections:

|  |  |
| --- | --- |
| [Action plan](#_Action_plan) | You can use the action plan at the beginning of this document to capture key actions to develop your business plan and your service.  This will be a ‘live’ action plan that you will need to review and update regularly. We have put this at the beginning of the document so that you can access it easily. |
| [Section 1: Executive summary](#_Section_1:_Executive) | This provides a quick snapshot of the program. This may help you to understand the program, and you can share this with your team and/or board or committee. |
| [Section 2: Welcome](#_Section_2:_Welcome) | This is an introduction to the program objectives and this document. |
| [Section 3: Business plan](#_Section_3:_Business) | This covers the key areas that you will need to work on to develop a business plan to develop or grow your NDIS service. |
| [Section 4: Other information](#_Section_4:_Other) | Further information about CBB and the program. |

Further information will be available on our website. We will release activity worksheets for each of the webinars. These will include additional templates and links to further information.

Before you get started

It’s worth reviewing…

* Your organisation’s mission and vision
* Your strategic plan (if you have one)
* Any data that you have on the people that you work with, or that you are intending to work with

At the end of the program

Read through your completed business plan template to check:

* Does your NDIS service fit within your organisation’s mission, vision and values, and strategic plan? Are there changes that you need to make to your existing organisation and business as a result of your plan for your NDIS service?
* Are there any gaps? If you don’t have everything you need to complete your business plan, update your action plan with the remaining activities
* Is it consistent? Does your business plan tell a clear and consistent story about your target market, service model and resourcing? Address any inconsistencies.

# Section 3: Business plan

## Using this template

This business plan takes you through the key areas required to develop a business plan for your NDIS product or service. Each section includes:

* A brief introduction to the section
* Key questions for you to answer as part of your business plan

The webinars, Q&A sessions and web resources will provide further resources to help you develop your business plan.

We’ve presented the plan in a logical sequence, so you can work through it section by section, but you will probably find that you will need to go back and forwards a bit. As you develop your business plan, you may find new information or have another idea that means you go back to a section you’ve already worked on. It may help to read the whole document through before you start, so you can capture your ideas in the relevant places.

## Organisation

This section of the business plan provides basic information about your organisation.

Organisation name:

NDIS service:

Date:

Prepared by:

Mission:

Vision:

Values:

Existing strategic objectives:

## Key questions

How does NDIS fit with your organisation’s

* Mission and vision
* Strategic objectives
* Existing projects and activities

## Market analysis

## Introduction

This section of the plan defines the market for your NDIS product. ‘Success in the NDIS’ and ‘Understanding the market’ (webinars 1 and 2 of the management series) will help you to work on this section of your business plan.

Before you invest in setting up or growing your service, it’s important to make sure that there is a market demand – or need – for the service you are offering. You may have a strong idea already about the type of service that you want to deliver, or have some information from potential customers about what they need. It is worth testing these ideas from different perspectives, so that you can build a better understanding of the market demand. This will help to plan a service that customers will pay for, and to communicate your plans with the decision makers in your organisation.

## Key questions

|  |  |
| --- | --- |
| What are your organisation’s strengths and weaknesses? |  |
| Who are your current customers? |  |
| What does the data tell you about market gaps or need?  i.e. opportunities for you to grow or start your business based on demand in your area, and the unmet demand in other areas. |  |
| What do your customers (or potential customers) say? |  |
| What information do you have from your stakeholders? |  |
| What does your competitor analysis tell you? |  |
| What are our strategic options, in terms of new or existing markets or products/ services? |  |

[Webinar 2 resources](https://www.cbb.com.au/ndis-success-round-2/toolkit/#webinar2) in the online Toolkit will assist you to complete this part of your business plan.

## Product/service

## Introduction

Once you’ve identified the need or gap in the market that you want to address, you can start designing the product or service that you are going to deliver. As well as thinking about the practicalities of your service, check that it does fall within the NDIS price guide as a service that can be funded under an NDIS plan. You should also think about why your customers would choose your service over your competitors.

The information you develop for this part of your business plan will inform decisions about resources, marketing and budgets.

‘Understanding the market’ and ‘Service design’ (webinars 2 and 3 of the management series) will help you to work on this section of your business plan.

## Key questions

|  |  |
| --- | --- |
| What is the NDIS product or service you will offer? |  |
| Who will purchase the services from you and do they have funding for this service? |  |
| How does it solve the problem for your customer, or address an identified market gap? |  |
| How will it be delivered? |  |
| Where will it be delivered? |  |
| How will technology be used to help you deliver the product? |  |
| What is your value proposition? What makes your product or service more attractive to your customers than your competitors’ products? |  |

[Resources for webinars 2 and 3](https://www.cbb.com.au/ndis-success-round-2/toolkit/#webinar2) in the online Toolkit will assist you to complete this part of your business plan.

## 

## Resourcing

## Introduction

Resource requirements include direct service delivery as well as your back office support functions, and any technology, equipment or premises you need to run your service. Under the NDIS Quality and Safeguards framework, some services can only be delivered by people with specific qualifications, which will impact in your recruitment and your service costs.

Understanding the resources you will need to deliver your service will inform your budget, and the financial sustainability of your service.

‘Service design’ and ‘Quality, compliance and risk’ (webinars 3 and 4 of the management series) will help you to work on this section of your business plan.

## Key questions

|  |  |
| --- | --- |
| What are the core skills you need to deliver your product or service?How much of these skills do you need and when? |  |
| What accreditations or qualifications do you need? |  |
| What support functions do you need for your new product or service? (e.g. finance, marketing, admin)How much of these skills do you need and when? |  |
| What physical resources do you need to deliver this product (e.g. premises, vehicles, equipment, technology)? |  |
| What digital resources (computers, phones, software, etc) do you need to deliver this service? |  |
| How will you recruit/secure the necessary resources? |  |
| How will you retain the necessary resources? |  |
| How will your resource requirements change as you increase the volume of your service? |  |

[Resources for webinars 3 and 4](https://www.cbb.com.au/ndis-success-round-2/toolkit/#webinar3) in the online Toolkit will assist you to complete this part of your business plan.

## Compliance, quality and risk management

## Introduction

You need to be a registered NDIS provider to be able to deliver services to the widest range of NDIS participants. Registration involves a range of compliance requirements, with some variation for different services. Registered providers are also subject to an NDIS audit. This section encourages you to understand the compliance requirements for your service and any other risks that you need to manage.

Any resources required for compliance and risk management should be included in your budget.

‘Quality, compliance and risk’ (webinar 4 of the management series) will help you to work on this section of your business plan.

## Key questions

|  |  |
| --- | --- |
| Will you work with any NDIS participant or only self and plan managed participants? |  |
| What registration group do you require to deliver this service? |  |
| Are you already registered for this service or will you need to apply for registration? |  |
| What are the NDIA Quality and Safeguards compliance requirements for this service? |  |
| What are the minimum staff qualifications requirements to deliver the service? |  |
| How will you ensure that you remain compliant? |  |
| What processes do you have in place for complaints management and incident reporting and management? |  |
| What processes do you have in place to screen your workers? |  |
| What are the key risks for this product or service? |  |
| What processes do you have in place for managing risks? |  |

[Webinar 4 resources](https://www.cbb.com.au/ndis-success-round-2/toolkit/#webinar4) in the online Toolkit will assist you to complete this part of your business plan.

## Marketing strategy and plan

## Introduction

You will have considered a lot of the areas required for this section in previous sections of the business plan. Your marketing planning will consider how you will secure sufficient client business to make your NDIS product or service financially viable. You should also consider the customer experience as this will contribute to customer retention and your brand reputation.

‘Strategies for success’ (webinar 5 of the management series) will help you to work on this section of your business plan.

## Key questions

|  |  |
| --- | --- |
| Who are your most important customers (your target market or customer segment)? |  |
| What value do you offer your customers?  How does this address their needs?  How is it different or better than your competitors? |  |
| How are you going to reach your customers? |  |
| How many customers do you need to win/retain? |  |
| What key messages do you need to communicate to your (current and new) customers through your marketing? |  |
| How much do you need to set aside as a marketing budget to ensure you attract enough new customers? |  |
| How will you promote your product or service:   * When you launch * On an ongoing basis |  |
| How will you ensure that your customers have a good customer experience? |  |

[Webinar 5 resources](https://www.cbb.com.au/ndis-success-round-2/toolkit/#webinar5) in the online Toolkit will assist you to complete this part of your business plan.

## Financials

## Introduction

Before developing a budget you must understand the financial workings of your business. You will need a basic understanding of how you will generate revenue and the costs involved in running your organisation. You will also need to consider the costs involved in setting up or scaling up your NDIS service, as well as the ongoing costs of providing the service.

Developing a budget and financial forecast for your new service is a key part of your business plan. It will tell you whether – and when – your new service is financially viable, and help you to understand your cashflow requirements.

Once your service is up and running, it is crucial to record your financial results in a timely and accurate manner. This will help you to analyse - quickly and easily - what’s working and what needs additional attention.

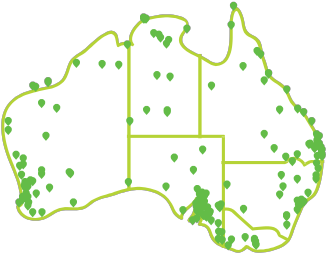
‘Sustainability in the NDIS’ (webinar 6 of the management series) will help you to work on this section of your business plan.

## Key questions

|  |  |
| --- | --- |
| How is revenue earned? |  |
| What are the “drivers” of revenue? |  |
| Which drivers of revenue do you have control over and which do you not have control over? |  |
| What is the maximum price you can charge for this service (NDIS price guide)? |  |
| How much will you charge for this service (if different from the price guide maximum)? |  |
| What are the set up costs in establishing your new service? |  |
| What will be on the ongoing costs of your organisation? |  |
| What are the costs directly related to providing the service? |  |
| How many units of the service do you need to sell to break even? |  |
| How will your sales of your service develop over a six to 12 month period? |  |
| What factors may impact cashflow? |  |
| What do you expect your cashflow to look like? |  |
| At what point will you need to invest more (in staff and other resources) in order to grow? |  |
| How will your fund service development or growth? |  |
| How will you measure your financial results? |  |
| How will compare the financial success of one service against another? |  |

[Webinar 6 resources](https://www.cbb.com.au/ndis-success-round-2/toolkit/#webinar6) in the online Toolkit will assist you to complete this part of your business plan.

# Section 4: Other information



**About Community Business Bureau**

Community Business Bureau (CBB) specialises in providing services to Australian not for profit organisations and their employees. For more than 20 years we’ve been operating as a not for profit social enterprise, serving more than 550 clients around Australia – from some of the largest not for profits in the country through to smaller, regional organisations.

Based in Adelaide, Perth, Darwin, Melbourne and Maitland, CBB has over 50 staff members committed to the continuing development of our products and services to better serve the community.

We’re dedicated to building the capacity and sustainability of NFPs through our expert business consulting services and salary packaging. Our offering includes partnerships with national brands such as Beyond Bank.

Our experience

CBB’s multi-disciplinary consulting team brings depth and breadth of practical experience in organisation operations and leadership in commercial, government and not for profit environments, alongside business consulting skills and extensive experience of NDIS consulting.

CBB’s consulting to not for profit organisations delivers on our mission to enhance the business capability of the sector. We work with organisations through periods of transition and change and at regular lifecycle stages and strategy reviews.

Community Development Program

At CBB, our driving force is a vision to support the not for profit sector to achieve its social objectives. Our focus is on building the business capability of purpose driven organisations, based on the belief that well managed, sustainable organisations are better able to deliver bigger social impact.

We commit a proportion of our resources and our surplus funds to activities that support the not for profit sector, through our Community Development Program:

* CBB Community Business Grants provide pro bono consulting support to a small number of organisations. You can register your interest in these grants [here](http://www.cbb.com.au/community/grants/), and we will contact you when we open a new round of applications.
* [Scholarships](https://www.cbb.com.au/community/scholarships/) for the South Australian Governor’s Leadership Foundation, providing professional development to sector employees.
* Free or subsidised tickets and travel costs for employees from regional not for profits to attend selected not for profit conferences and events.
* Employee volunteering, including skilled volunteering as members of not for profit boards and committees.
* Matching up not for profit boards with potential board members through [BoardMatch](http://www.cbb.com.au/community/boardmatch/).
* A $5 donation from every ticket sold to our [Community ExecNet](http://www.cbb.com.au/about-us/events/)breakfast series to a local charity (which is then matched by funds from our Community Development Program).
* Employee fundraising events for charities selected by our employees. CBB matches the funds raised by employees with a donation from our Community Development Program.

**Independence and confidentiality**

CBB is a not for profit social enterprise, governed by an independent board. We operate on a fee for service business model. This program is funded by the Australian Government Department of Social Services. CBB’s Community Development Fund is also contributing funds to the program.

We will use any information you provide us during the course of this program for the following purposes:

* Delivering the program.
* Improving program content.
* Informing our blogs, events and other activities that support providers to operate in the NDIS environment.

We will keep all of your confidential information confidential. CBB may only disclose your confidential information for the purposes of providing these services or if required to do so by law.

We will not ask you to provide CBB with personal data on the people you work with.

We engage with the NDIA to inform our understanding of the NDIS, but we do not represent the NDIA. We cannot influence NDIS policy or operations, and do not have access to internal NDIA information or advance notice about policy changes.

**Quality assurance**

Customer service is core to our values and it is important to CBB that we deliver the activities and the results outlined in this template. We are committed to continuous improvement and welcome your feedback at any point during your relationship with CBB.

We will ask for your feedback on how things are going during the course of the NDIS Roadmap, and at the end of the program.

We will ask for your feedback through phone calls to a sample of participating organisations, and online surveys. Please do complete surveys when we send you the links. Your feedback enables us to develop and strengthen our services so that they continue to meet the changing needs of the not for profit sector.

**Complaints and disputes**

CBB is committed to the successful delivery of the NDIS Success program. Should you have concerns or complaints regarding the quality of work or your relationship with CBB, complaints can be lodged with Jane Arnott, General Manager, Consulting and Business Services, via [**jarnott@cbb.com.au**](mailto:jarnott@cbb.com.au).

You may request a virtual meeting with Jane Arnott to discuss the complaint and endeavour to resolve the matter in a practical manner.

Complaints are managed with the expectation of mutual respect. CBB will act in good faith and will not behave or communicate in any way which might reasonably be expected to interfere with your business or damage your organisation’s reputation. We request the same of you in return.

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