Logo

Description automatically generated

[Enter your business name]

Agency Business Plan

**Date:** Insert

**Contents**

[Executive Summary 3](#_Toc99966816)

[Our Mission 4](#_Toc99966817)

[Our Values 4](#_Toc99966818)

[Market Research Findings 5](#_Toc99966819)

[Competitor Analysis 6](#_Toc99966820)

[Unique Selling Proposition (USP) 7](#_Toc99966821)

[Service Offering 8](#_Toc99966822)

[Go-To-Market (GTM) Plan 9](#_Toc99966823)

[Organization Structure & People 10](#_Toc99966824)

[Goals & Sales Forecasting 11](#_Toc99966825)

[Goals for next year 11](#_Toc99966826)

[Goals for the next 3 years 11](#_Toc99966827)

[Cash flow forecast 12](#_Toc99966828)

[Tools & Tech 13](#_Toc99966829)

# Executive Summary

[Complete this section last so you can summarise informationfrom the rest of your plan.]

|  |  |
| --- | --- |
| **What our agency does** |  |
| **Our target market** |  |
| **Our USP (Unique Selling Proposition** |  |
| **Our GTM (Go-To-Market) Plan** |  |
| **Our business goals** |  |

# Our Mission

[Insert a statement which defines your agency’s objectives and its approach. Why will this agency exist and what is its purpose?]

| [Example: We exist to help Restaurants and Bars drive high performance from SEO. Our team has deep domain experience in both hospitality and SEO.] |
| --- |

### Our Vision

*[Insert your long-term desired future position of the agency – where will it be in 5 or 10 years?]*

| [Example: To be the most sought-after and respected SEO agency serving Restaurants and Bars in the state of Texas.] |
| --- |

# Our Values

*[Insert your agency’s values such as 3 to 5 words or short statements that the team can believe in and embody day-to-day]*

| [Example:  RESULTS THAT MATTER: we focus only on the results that matter for our clients  TRANSPARNECY: always transparent both internally and externally  ALWAYS LEARNING: stay curious and never stop learning and improving] |
| --- |

# Market Research Findings

### Qualitative findings

*[Insert findings from qualitative research such as one-on-one interviews, meetings, focus groups or workshops]*

|  |
| --- |

### Quantitative findings

*[Insert findings from quantitative research such as online surveys, open or click rates from mass emails, multivariate testing or other high-volume research methods]*

|  |
| --- |

# Competitor Analysis

The top 3 businesses we’re competing against, what they do well and not so well. What we’ll do differently to succeed in the market.

|  |  |  |  |
| --- | --- | --- | --- |
| **Competitor name** | [Example: A1 Digital Marketing] |  |  |
| **Strengths** | [Example: Low price points] |  |  |
| **Weaknesses** | [Example: Low quality work with questionable track record] |  |  |
| **What we’ll do differently** | [Example: We are results-driven and only work with clients who want to achieve goals, not the ones looking for the lowest cost work.] |  |  |

# Unique Selling Proposition (USP)

*[Insert how you will set your agency apart from competitors to effectively compete for your target clients.]*

|  |
| --- |

### SWOT analysis

Our business strengths, weaknesses, opportunities and threats.

|  |  |
| --- | --- |
| **Strengths**  What’s good about our agency. |  |
| **Weaknesses**  What’s not so good about our agency. |  |
| **Opportunities**  External factors we could take advantage of. |  |
| **Threats**  External factors that could cause problems for us. |  |

# Service Offering

| Service | Description | Indicative price |
| --- | --- | --- |
|  |  | $ |
|  |  | $ |
|  |  | $ |

### Pricing strategy

How we set prices for our services.

|  |
| --- |

# Go-To-Market (GTM) Plan

### Our target market

The group of clients that we aim to sell our services to.

| [Example: We target restaurants and bars in Houston and San Antonio with 15 or more staff.] |
| --- |

### GTM activities

[Focus on the channels and activities that suit your target market.]

The channels we’ll use to communicate with our target clients.

| **Channel** | **Used for** | **Details** |
| --- | --- | --- |
| [Example: Social Media] | [Example: Promotion prior to launch] | [Example: We’ll use regular Facebook posts to promote the agency and our expertise] |
|  |  |  |
|  |  |  |
|  |  |  |

# Organization Structure & People

### Our people

| Role | Name  If role is filled. | Skills and experience |
| --- | --- | --- |
| [Examples: Founder, Head of SEO, Account Director] |  |  |
|  |  |  |
|  |  |  |

### Sources of advice and support

External people or organisations that provide support to our business.

| **Support type** | **Name** | **Skills and experience** |
| --- | --- | --- |
| [Example: Accountant.] |  |  |
|  |  |  |
|  |  |  |

### Skill and staff retention strategies

How we keep our staff working for us and maintain their skills.

| [Example: The Founder regularly checks in with staff, all staff attend weekly team meetings, we offer free courses to maintain staff skills and involve staff in our professional development planning process.] |
| --- |

# Goals & Sales Forecasting

## ****Goals for next year****

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***[Enter a goal]*** | ***[Enter a goal]*** | ***[Enter a goal]*** |
| Actions to achieve goal | * [Action] * [Action] * [Action] | * [Action] * [Action] * [Action] | * [Action] * [Action] * [Action] |
| Due date |  |  |  |
| Who’s responsible |  |  |  |

## Goals for the next 3 years

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***[Enter a goal]*** | ***[Enter a goal]*** | ***[Enter a goal]*** |
| Actions to achieve goal | * [Action] * [Action] * [Action] | * [Action] * [Action] * [Action] | * [Action] * [Action] * [Action] |
| Due date |  |  |  |
| Who’s responsible |  |  |  |

## Cash flow forecast

Our forecast cash flow for the next calendar year.

|  | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Monthly cash balance | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Closing balance | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |

# Tools & Tech

### Digital technology

Technology we plan to use for our business.

| [Examples: project management, accounting software, comms tools, CRM and other subscription software]   * [SEOptimer](https://www.seoptimer.com/embeddable-audit-tool/): for generating new business leads from our agency website |
| --- |