



HEALTH
COMMUNICATION
CAPACITY
COLLABORATIVE



RESOURCE Mobilization Implementation Kit

A Deep Dive into Business Planning

Presenters:

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FROM THE AMERICAN PEOPLE

Introductions

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Poll 1

Does your organization generate income by offering products and/or services to clients at a fixed price?



Poll 2

Does your organization conduct market research for the design of new or improvement of existing products and/or services?



Poll 3

Are you responsible for designing and/or marketing products and/or services?



Outline

- Define business planning
- Outline three critical observations about business planning
- Discuss the pie of ignorance model
- Review the 8 steps to drafting a business plan
- Showcase I-Kit tools “highlights”



Definition

A **business plan** is a plan used to secure funding for a new product or service to be offered by the organization, or to expand current products and services to new or larger markets. It includes projections of the estimated financial and social return for the development and introduction of the new product or service.

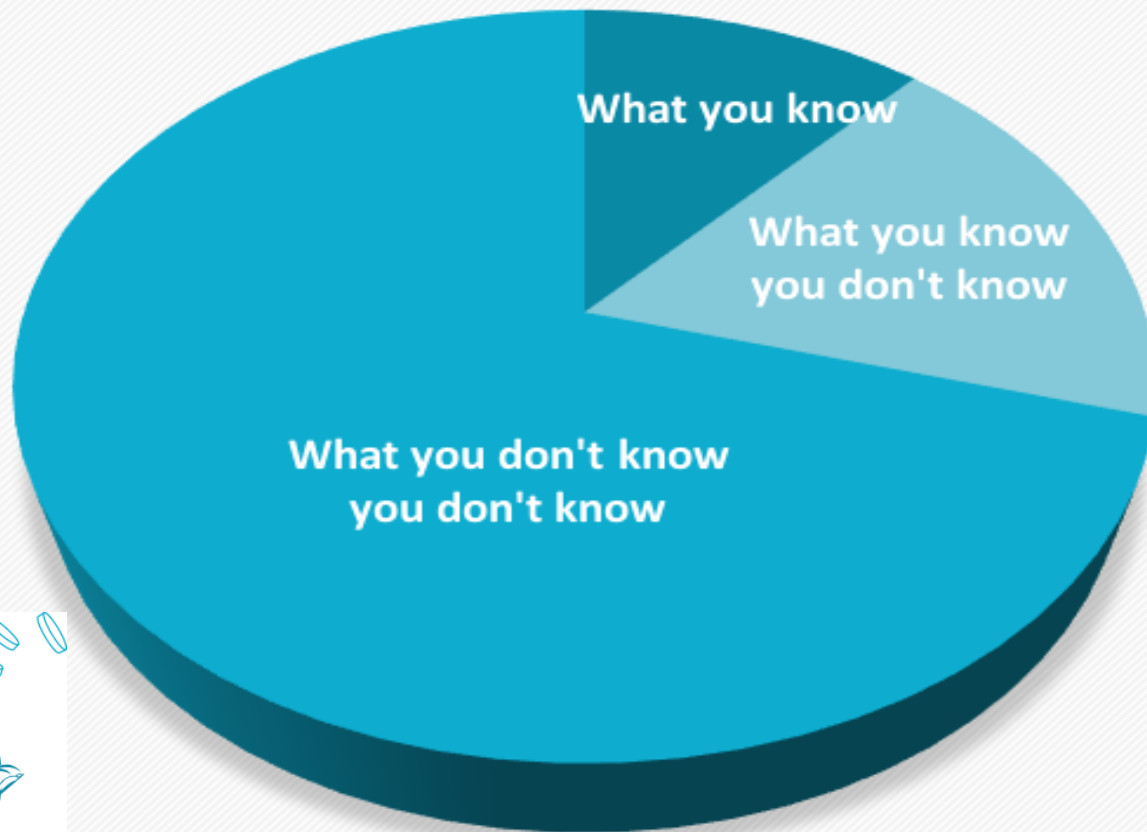


Three Critical Observations

- Money follows good ideas
- Funders and investors want a social return
- The best ideas are the ones generated in response to a client's needs



The Pie of Ignorance Model



Eight Steps to Business Planning

1. The Organization's Mission
2. The New Business Opportunity
3. The Market for the New Business Opportunity
4. Plan for Design and Launch
5. The Financial Health of the Organization
6. Funding Requirements
7. Return on Investment
8. The Evaluation Plan

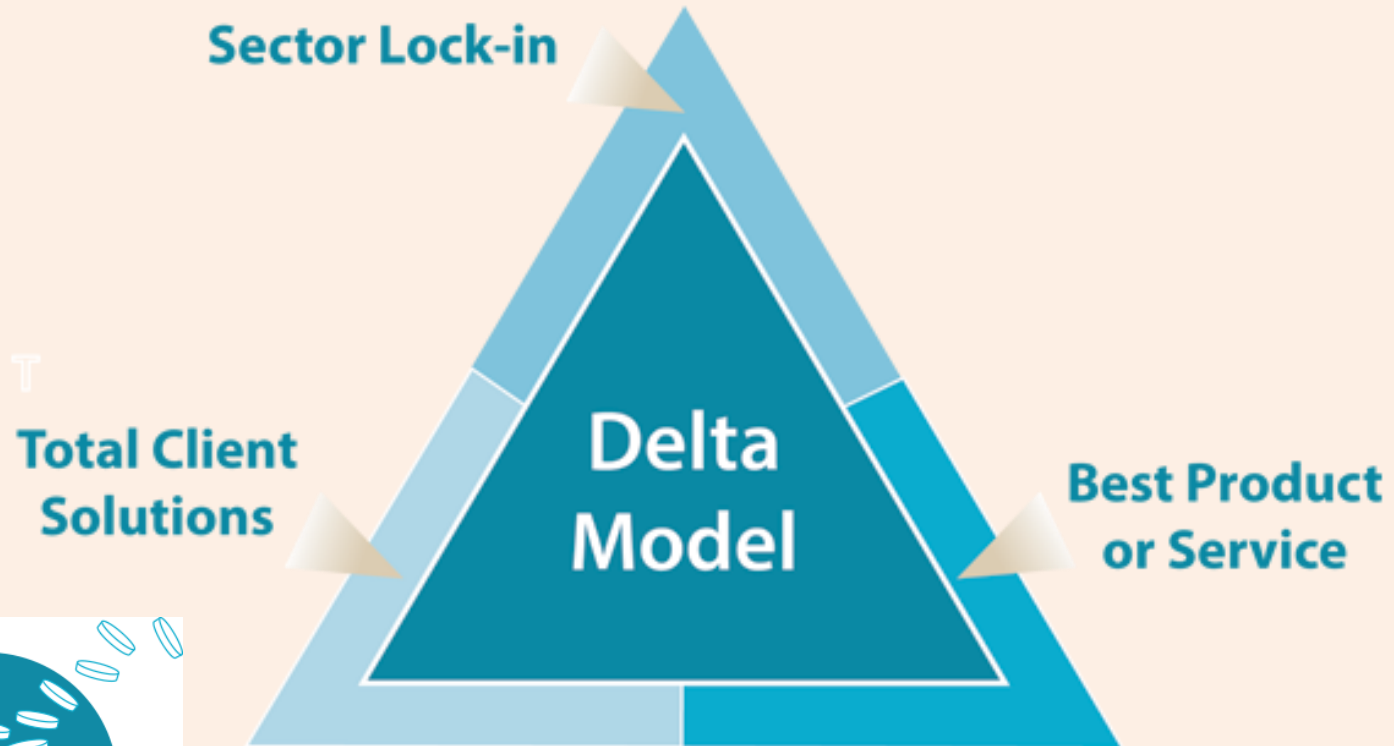


1. The Organization's Mission

- The Story Behind the Organization
- Current Scope
- Strategic Position
- Core Competencies



Highlight: The Delta Model



2. The New Business Opportunity

- Breakthrough Ideas
- Strategic Mapping
- Internal Investment
- Competitive Scan Tool
- Stakeholders' Commitment
- Statement of Justification



Highlight: Competitive Scan Tool

Client Demand					Evidence to support ranking
Potential size of market	Small			Large	
Availability of substitutes	Many			Few	
Clients' ability to pay	Low			High	

Ease of Entry					Evidence to support ranking
Brand identification or identity	Low			High	
Relationship to existing products or services	Weak			Strong	
Access to distribution channels	Restricted			Ample	
Capital requirements	High			Low	
Access to appropriate technology	Restricted			High	

Cost of Failure					Evidence to support ranking
Degree of product or service specialization	High			Low	
Cost of exit	High			Low	
Strategic interrelationship with other organizations	Many			Few	
Emotional barriers	High			Low	
Investment made in complying with government regulations	High			Low	

Threat of Competition					Evidence to support ranking
Number of competitors	Large			Small	
Growth of target market	Slow			Fast	
Product features	Common			Unique	
Service features	Common			Unique	

Overall Assessment	Least likely to succeed	Neutral	Most likely to succeed	Evidence to support assessment
Client Demand	0	0	0	
Ease of Entry	0	0	0	
Cost of Failure	0	0	0	
Threat of Competition	0	0	0	
Weighted total:	0	0	0	



3. The Market for the New Business Opportunity

- Market Research Design
- Data and Report
- Marketing Plan



4. Plan for Design and Launch

- Design Team
 - Idea Generator
 - Entrepreneur
 - Manager
 - Gatekeeper
 - Coach
- Five Steps to launching a new product and/or service:
 - Design
 - Test
 - Package
 - Promote
 - Manage



Highlight: Financial Modeling Tool

BUSINESS PLANNING FOR HEALTH:

FOR THE PRODUCT OR SERVICE:

Step 1: Design the Prototype

BUDGET COST for Step 1: Design the Prototype -

Activities

Activity 1: *"Enter Activity Title & Description Here"*

Person	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Total
	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE
													-
													-
													-
													-
													-
													-

Activity 2: *"Enter Activity Title & Description Here"*

Person	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Total
	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE
													-
													-
													-
													-
													-

Activity 3: *"Enter Activity Title & Description Here"*

Person	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Total
	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE	LOE
													-
													-
													-
													-

Internal Only Notes/Descriptions

Please see notes in this column for your reference, and also use this as desired to leave activity/assumption notes.

Instructions: Enter all potential costs required for this particular budget. Activities should be titled and a small description should be provided. There are drop-down menus in column C under each activity that will list the names you have entered in the "Master Staff List" tab. In the cells to the right of each name, enter in the number of days that person will require to carry out the activity.

Other Expenses will have the same layout for drop-downs; however, rather than providing the number of days, you will put the actual monetary value in the cells to the right.

These expenses will calculate automatically in cell P7. A budget will automatically be created for you in the "Launch Budget" tab.

Add row: Select this row, copy, right-click and "Insert Copied Cells"

Add row: Select this row, copy, right-click and "Insert Copied Cells"

Add new activity by copying entire existing activity and right click to

Home |
 Main Menu |
 Basic Information |
 Master Staff List |
 Design |
 Test |
 Package |
 Promote |
 Manage |
 Product Forecast |
 BPH Summary |
 Launch Budget |
 Financial Charts |
 Gantt |
 Log



5. The Financial Health of the Organization

- Terms and Definitions
- Balance Sheet
- Income Statement
- Statement of Cash Flows



6. Funding Requirements

Launch Budget

Line Item	AMOUNT		FINANC		TOTAL \$	
	City	City	B	F	City	%
Staff	18,333	18,333			36,666	100%
TSC Staff Name 04	0.000	0.000			0.000	0%
TSC Staff Name 05	0.000	0.000			0.000	0%
TSC Staff Name 06	0.000	0.000			0.000	0%
TSC Staff Name 07	0.000	0.000			0.000	0%
TSC Staff Name 08	0.000	0.000			0.000	0%
TSC Staff Name 09	0.000	0.000			0.000	0%
TSC Staff Name 10	0.000	0.000			0.000	0%
TSC Staff Name 11	0.000	0.000			0.000	0%
TSC Staff Name 12	0.000	0.000			0.000	0%
TSC Staff Name 13	0.000	0.000			0.000	0%
TSC Staff Name 14	0.000	0.000			0.000	0%
TSC Staff Name 15	0.000	0.000			0.000	0%
TSC Staff Name 16	0.000	0.000			0.000	0%
TSC Staff Name 17	0.000	0.000			0.000	0%
TSC Staff Name 18	0.000	0.000			0.000	0%
TSC Staff Name 19	0.000	0.000			0.000	0%
TSC Staff Name 20	0.000	0.000			0.000	0%
Direct Salary	18,333	18,333			36,666	100%
Total Salary	18,333	18,333			36,666	100%
Non-Personnel						
Communications	0.000	0.000			0.000	0%
Equipment	0.000	0.000			0.000	0%
Facilities	0.000	0.000			0.000	0%
Outsider Services	0.000	0.000			0.000	0%
Printing & Shipping	0.000	0.000			0.000	0%
Printing & Photocopying	0.000	0.000			0.000	0%
Supplies & Materials	0.000	0.000			0.000	0%
Travel	0.000	0.000			0.000	0%
Administrative Costs	0.000	0.000			0.000	0%
Total Non-Personnel	0.000	0.000			0.000	0%
TOTAL	18,333	18,333			36,666	100%

Product Forecast

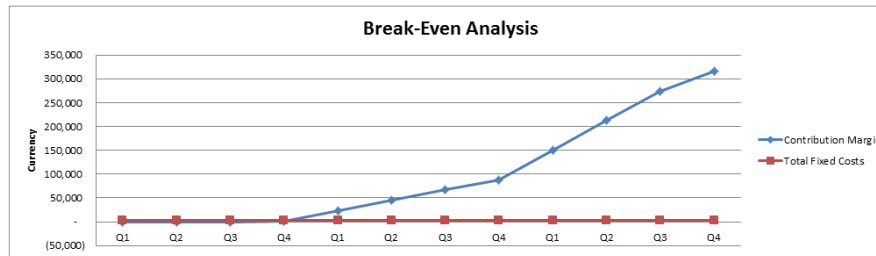
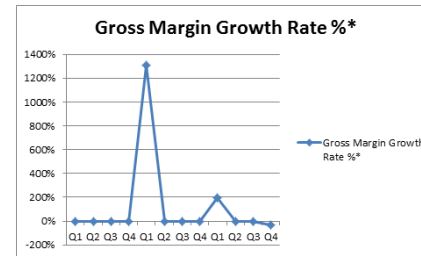
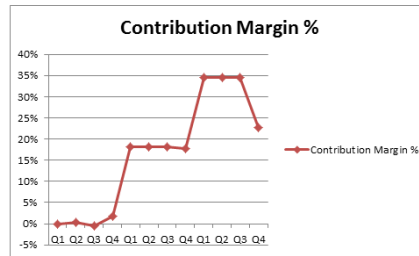
Product Name	MONTHS											
	1	2	3	4	5	6	7	8	9	10	11	12
Product A	100	100	100	100	100	100	100	100	100	100	100	100
Product B	50	50	50	50	50	50	50	50	50	50	50	50
Product C	20	20	20	20	20	20	20	20	20	20	20	20
Product D	10	10	10	10	10	10	10	10	10	10	10	10
Product E	5	5	5	5	5	5	5	5	5	5	5	5
Product F	2	2	2	2	2	2	2	2	2	2	2	2
Product G	1	1	1	1	1	1	1	1	1	1	1	1
Product H	0	0	0	0	0	0	0	0	0	0	0	0
Product I	0	0	0	0	0	0	0	0	0	0	0	0
Product J	0	0	0	0	0	0	0	0	0	0	0	0
Product K	0	0	0	0	0	0	0	0	0	0	0	0
Product L	0	0	0	0	0	0	0	0	0	0	0	0
Product M	0	0	0	0	0	0	0	0	0	0	0	0
Product N	0	0	0	0	0	0	0	0	0	0	0	0
Product O	0	0	0	0	0	0	0	0	0	0	0	0
Product P	0	0	0	0	0	0	0	0	0	0	0	0
Product Q	0	0	0	0	0	0	0	0	0	0	0	0
Product R	0	0	0	0	0	0	0	0	0	0	0	0
Product S	0	0	0	0	0	0	0	0	0	0	0	0
Product T	0	0	0	0	0	0	0	0	0	0	0	0
Product U	0	0	0	0	0	0	0	0	0	0	0	0
Product V	0	0	0	0	0	0	0	0	0	0	0	0
Product W	0	0	0	0	0	0	0	0	0	0	0	0
Product X	0	0	0	0	0	0	0	0	0	0	0	0
Product Y	0	0	0	0	0	0	0	0	0	0	0	0
Product Z	0	0	0	0	0	0	0	0	0	0	0	0



7. Return on Investment

- Social Returns
- Financial Returns

Product or Service Financial Charts



8. The Evaluation Plan

Social and Financial Return Gantt Chart

Gantt Chart to Schedule the Monitoring and Evaluation of Social Return															
Column 1: Social Return Indicator	Column 2: Social Return Indicator Status		Column 3: Monitoring and Evaluation Activities	Column 4: Months											
	Current	Projected		1	2	3	4	5	6	7	8	9	10	11	12
Health Status			Monitoring and Evaluation Activities	1	2	3	4	5	6	7	8	9	10	11	12
			Staff Assigned:												
			Activities:												
Access			Monitoring and Evaluation Activities	1	2	3	4	5	6	7	8	9	10	11	12
			Staff Assigned:												
			Activities:												
Quality			Monitoring and Evaluation Activities	1	2	3	4	5	6	7	8	9	10	11	12
			Staff Assigned:												
			Activities:												



Up Next!

- Deep Dive into Proposal and Grant Development (September 24, 2015, 8:30 a.m. EST)
- Launch of the Resource Mobilization I-Kit (September 30, 2015)



Questions?

