

The business plan within SME Instrument/FTI

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Business Plan in SME Instrument and FTI



**Proposal template
(technical annex)**

SME instrument – phase 1

The application shall provide

- 1) an outline of the envisaged overall innovation project, its intended scope, merits, risks and state of development to allow for an assessment of the business idea as well as an initial business plan based on the proposed idea/concept
- 2) a description of the activities to be undertaken during phase 1 that shall result in a comprehensive feasibility report, including the specifications of the elaborated business plan, which is to be the outcome of the project (for more details refer to the Work Programme and the Guidance documentation).

Please follow the structure of this template when preparing your proposal. It has been designed to ensure that the important aspects of your planned work are presented in a way that will enable the experts to make an effective assessment against the evaluation criteria. Sections 1, 2 and 3 each correspond to an evaluation criterion for a full proposal.

Please be aware that proposals will be evaluated as they were submitted, rather than on their potential if certain changes were to be made. This means that only proposals that successfully address all the required aspects will have a chance of being funded. There will be no possibility for significant changes to content, budget and consortium composition during grant preparation.

⚠ Page limit: The cover page, and sections 1, 2 and 3, together should not be longer than 10 pages. The two tables in these sections must be included within this limit. The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).

The page limit will be applied automatically; therefore you must remove this instruction page before submitting.

If you attempt to upload a proposal longer than the specified limit, you will receive an automatic warning and will be advised to shorten and re-upload the proposal. Any excess pages will be overprinted with a 'watermark', indicating to evaluators that these pages must be disregarded.

Please do not consider the page limit as a target! It is in your interest to keep your text as concise as possible, since experts rarely view unnecessarily long proposals in a positive light.

- Business Plan:
Part B 1-3
- Phase 1: „initial business plan“
- Phase 2 and FTI: „developed business plan“

Group Task

- What aspects of a business model are covered in SME Instrument proposals?

Aim:

- Create a better overall understanding of a business plan, its building blocks and their linkages
- Support tool for NCPs to consult SMEs

Target groups

Who are our sales targets and who will be using our offering?



Customers | Users

Brand & messages

How do we want our brand to be perceived and what is our story to sell the offering?



Offerings

What bundle of products and services do we offer to our customers and users?



Resources

What (kind of) key resources do we need to create and deliver the offering?



Partners

Who are our partners if key partners to create and deliver the offering?



Suppliers | Sales

Channels

Pains

Primary

What is our primary customer and user segment that unlocks the most value in our business and is most easily accessible?

DNA ▶

Job(s) to get done

What job(s) do our customers and users trying to get done?

Gains

Through which channels do our customers and users want to be reached?



Relationships

What kind of relationships do our customers and users expect?



Core value

What kind of value do we create for customers and users without offerings?

Channels

Through which channels do our partners want to be reached?



Unfair advantage

What if it needs better than our competitors, which is hard to copy?

Processes

What (kind of) key processes do we need to create and deliver the offering?



Profit formula

Pattern

How, when and how often do we charge our customers?



Pricing & revenue streams

What are our revenue streams and how much do our customers pay (per unit)?

Costs

What are the most important costs to create and deliver the offering?

Investments

How much money do we need to spend before we earn?



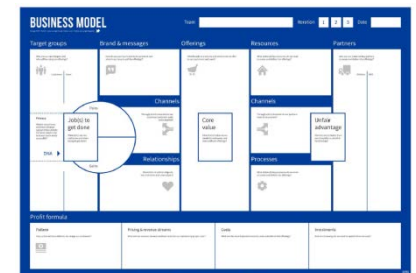
Group Task

Task 1 (15 Minutes):

- Match the SME Instrument Proposal Template with Business Model Scheme with.
- Discuss:
 - What aspects are covered in the canvas?
 - Which aspects are missing?
 - Could the canvas support you in consulting SMEs in the

Task 2 (one group 10 Minutes):

- Present findings in plenum



1

2

3

Target groups

Who are our sales targets and who will be using our offering?



Customers | Users

Brand & messages

How do we want our brand to be perceived and what is our story to sell the offering?



Offerings

What bundle of products and services do we offer to our customers and users?



Resources

What (kind of) key resources do we need to create and deliver the offering?



Partners

Who are our partners if key partners to create and deliver the offering?



Suppliers | Sales

Channels

Pains

Primary

What is our primary customer and user segment that unlocks the most value in our business and is most easily accessible?

DNA ▶

Job(s) to get done

What job(s) do our customers and users really trying to get done?

Gains

Through which channels do our customers and users want to be reached?



Relationships

What kind of relationships do our customers and users expect?



Core value

What kind of value do we create for customers and users without offerings?

Channels

Through which channels do our partners want to be reached?



Unfair advantage

What if it needs better than our competitors, which is hard to copy?

Processes

What (kind of) key processes do we need to create and deliver the offering?



Profit formula

Pattern

How, at how and how often do we charge our customers?



Pricing & revenue streams

What are our revenue streams and how much do our customers pay (per unit)?

Costs

What are the most important costs to create and deliver the offering?

Investments

How much money do we need to spend before we earn?





Who are our sales targets and who will be using our offerings?

2. Impact - 2.1 Expected Impacts

a) Users / Market

- Describe the **targeted users** of the final solution; in which market segment/geographical areas do you see these potential users, and how do you intend to reach them?
- Describe the **type of market** (e.g. a niche market or high volume market). What is the estimation of total available market size and growth rate? What are the **market trends**? Describe if and how your project addresses European and/or global markets;

BUSINESS MODEL

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Objectives

Team

Iteration

1

2

3

Date

18.02.2016

SME Instrument Training | Daniel Stürzebecher

Target groups

Brand & messages

Offerings

Resources

Partners

Who are our sales targets and who will be using our offerings?

How do we want our brand to be perceived and what is our story to sell the offerings?

What bundle of products and services do we offer to our customers and users?

What (internal) key resources do we need to create and deliver the offerings?

Who are our (external) key partners to create and deliver the offerings?

Customers | Users

targeted users

communication measures

Concept + Activities

Further steps towards "ready for market"

consortium

market trends

type of market

Channels

Problem + Solution
Stage of Development + TRL

Channels

Key-Stakeholders

Primary

What is our primary customer and user segment that unlocks the most value in our business and is easily accessible?

Job(s) to get done

What job(s) are our customers and users trying to get done?

Through which channels do our customers and users want to be reached?

USP value

What is our unique value proposition for customers and users (with our offerings)?

Through which channels do our customers and users want to be reached?

Performance against competing solutions

competitors

Industrial Property Rights

Freedom to Operate

DNA

user needs

Relationships

Novelty

Processes

Work plan

market segments

What is our relationship to our customers and users?

Key Market Applications

Growth Potential

regulatory requirements

organisational structure

innovation management

Innovation's fit to business strategy

Profit formula

Pattern

How, when and how often do we charge our customers?

Price

What a

Commercialisation Plan

Revenue streams

What are the revenue streams and how much do our customers pay (per unit)?

Costs

What are the most important costs of creating and delivering the offerings?

Investments

How much money do we need to spend before we earn?

Resources to be committed

Funding Requirements

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Business Design GAME | Playing seriously with innovation
market barriers

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