



Business Plan - Using LivePlan to Create

**You may give away this report.
It may not be sold or modified in any manner.**

Disclaimer

Reasonable care has been taken to ensure that the information presented in this book is accurate. However, the reader should understand that the information provided does not constitute legal, medical or professional advice of any kind. No Liability: this product is supplied "as is" and without warranties. All warranties, express or implied, are hereby disclaimed. Use of this product constitutes acceptance of the "No Liability" policy. If you do not agree with this policy, you are not permitted to use or distribute this product. Neither the author, the publisher nor the distributor of this material shall be liable for any losses or damages whatsoever (including, without limitation, consequential loss or damage) directly or indirectly arising from the use of this product. Use at your own risk.

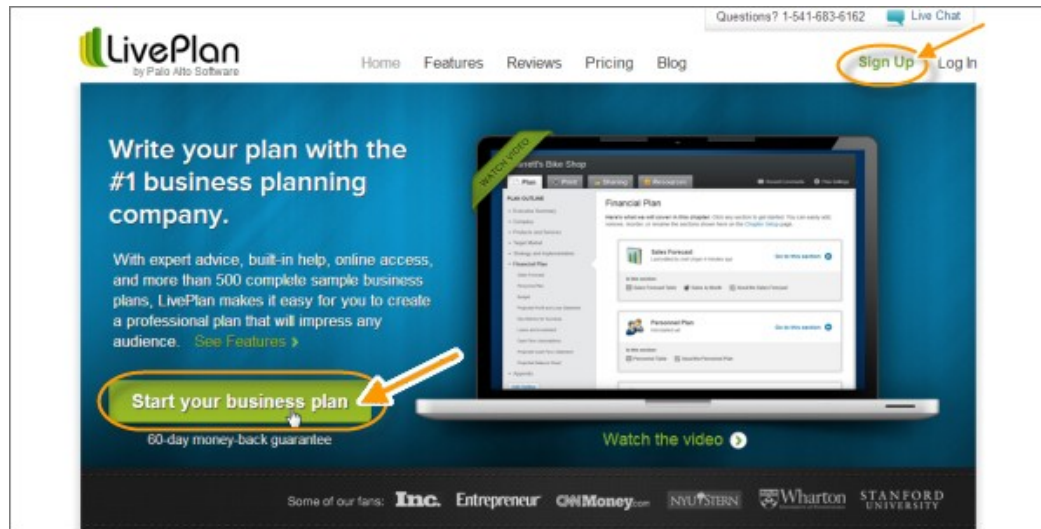
Business Plan - Using LivePlan to Create

You've decided to make things easy and sign up for LivePlan. This guide will walk you through quickly setting up your account and creating your first business plan.

LivePlan is safe and secure. There are over 500 sample plans and templates. You can access it anywhere, from any device (as well as allow your team to work on the plan with you). You can also integrate your LivePlan business plan with QuickBooks, for really easy financials. And Tim Berry's "Plan-As-You-Go Business Plan" ebook is included with your subscription.

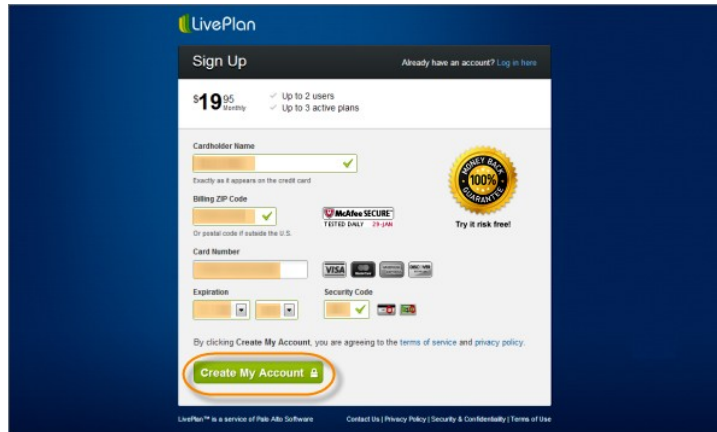
Step 1. Signing Up

1. Go to [LivePlan](#). Click on either the green "Start your business plan" button or the "Sign Up" link. Fill in your contact information.



2. LivePlan will confirm that your data is not a duplicate of someone else's as you enter your information.

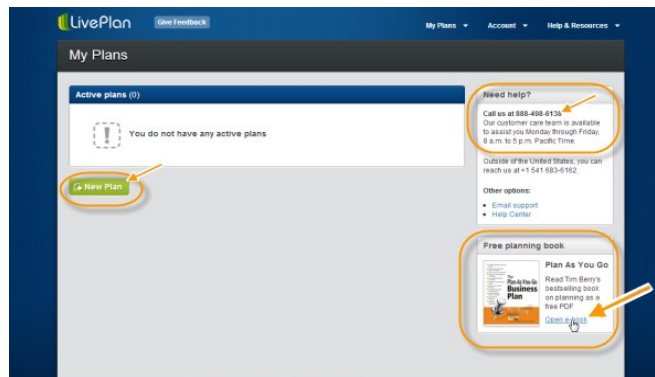
3. Enter your credit card information, including your zip code or postal code, and your three-digit security number (found on the back of your credit card).



4. Press the green "Get Started" button in the next screen that opens up.



5. Download your free ebook (bottom right corner): Then make a note of the Help phone number and times, and finally click on the green "New Plan" button.



Step 2. Preparing to Build Your Plan

You'll build your plan around what author Tim Berry calls the "core" – market, identity and focus. This will help you create a dynamic, active plan – not a "ponderous document" that is guaranteed to put your investors to sleep. Yet it will contain all the hard data you need.

You will love planning with LivePlan, whose aim is to help you "keep it simple and practical".

Before you go any further, take the time to read Berry's ebook. If you're in a hurry, go to Page 14 and treat the three points he makes as an exercise: Brainstorm and write down your core competencies and focus.

THE PLAN-AS-YOU-GO BUSINESS PLAN

The essence of the plan is its heart, its flesh, and its bone. It isn't necessarily a document, or a presentation, or a speech, or a summary; it's what you're doing and what's supposed to happen. The output of that might vary. Its actual physical existence might be as simple as thoughts in your head, at the beginning, and—I really hope—will quickly become a collection of words and pictures and numbers you keep on your computer.

The Heart of the Plan: The Core Strategy

1. *Who you are.* As a company, if you are one, or as an individual if you're just starting a one-person business. *It's your identity.* Your DNA. Especially what you do well, differently, better; long-term objectives. Goals. Dreams. What do you like to do? Keep the focus in mind, too; that is, think about who you aren't, what you don't do well.
2. *Whom you reach.* That's a customer, a company that buys from you, a client, a beneficiary. Your target market. By the way, it's hard to pull this apart from how they find you, how they know who you are and what you do. Keep focus in mind: who is your target, and what's different about your target that narrows the focus better. Whom don't you reach on purpose? How is your target different from the rest?
3. *What you do for your target.* Fill a need, perform a service, offer a benefit. *What business are you in?* Think of focus as well, meaning what you don't do for your customer.



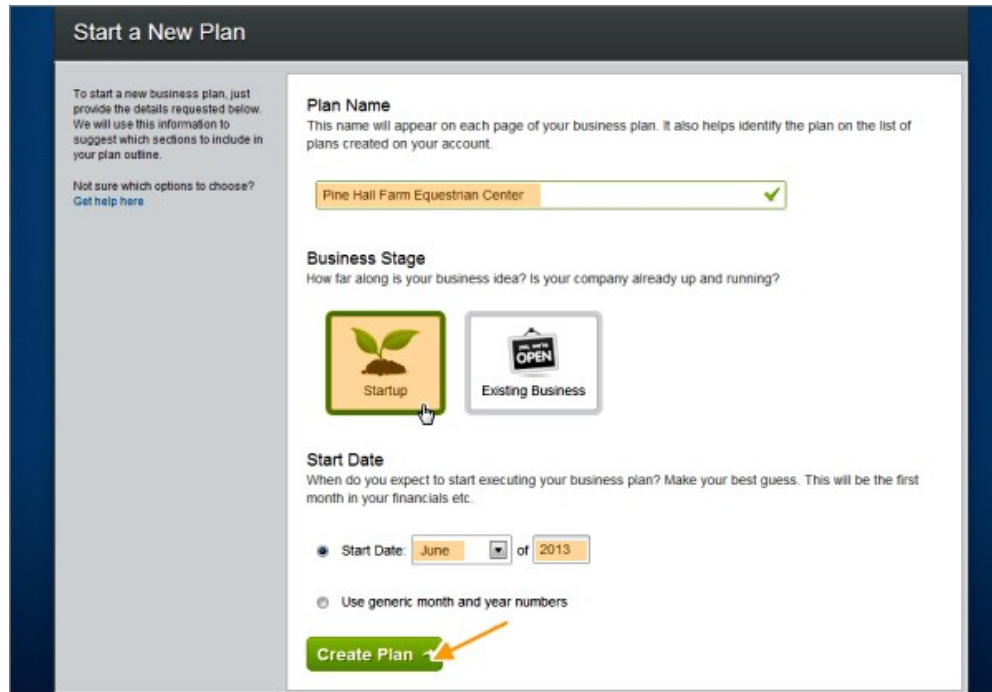
You can probably see here why I might call these items *identity*, *market*, and *offering*—more standard terms, that sound more MBA-like. Also, I might call them the *tricameral heart* of the plan.

Is this strategy? Maybe, when done well. Strategy is focus. Make that heart of your plan strategic by focusing more narrowly on the most important elements. Narrow your sense of identity to focus on core competencies, what

Step 3. Getting Started

Once you've read through the book (which is not a long read at all) and done your preliminary brainstorming, return to your LivePlan screen and continue creating your first Business Plan, using the easy Wizard.

1. Name your plan, indicating whether or not it is for a new business.



The screenshot shows the 'Start a New Plan' wizard. On the left, there is a sidebar with instructions: 'To start a new business plan, just provide the details requested below. We will use this information to suggest which sections to include in your plan outline.' Below this is a link: 'Not sure which options to choose? Get help here'. The main content area has three sections: 'Plan Name' with a text input field containing 'Pine Hall Farm Equestrian Center' and a green checkmark; 'Business Stage' with two buttons: 'Startup' (selected) and 'Existing Business'; and 'Start Date' with a radio button selected for 'Start Date: June of 2013' and another option 'Use generic month and year numbers'. At the bottom, a green 'Create Plan' button is highlighted with an orange arrow.

For our purposes here, we are going to create a simple Start-up Plan.

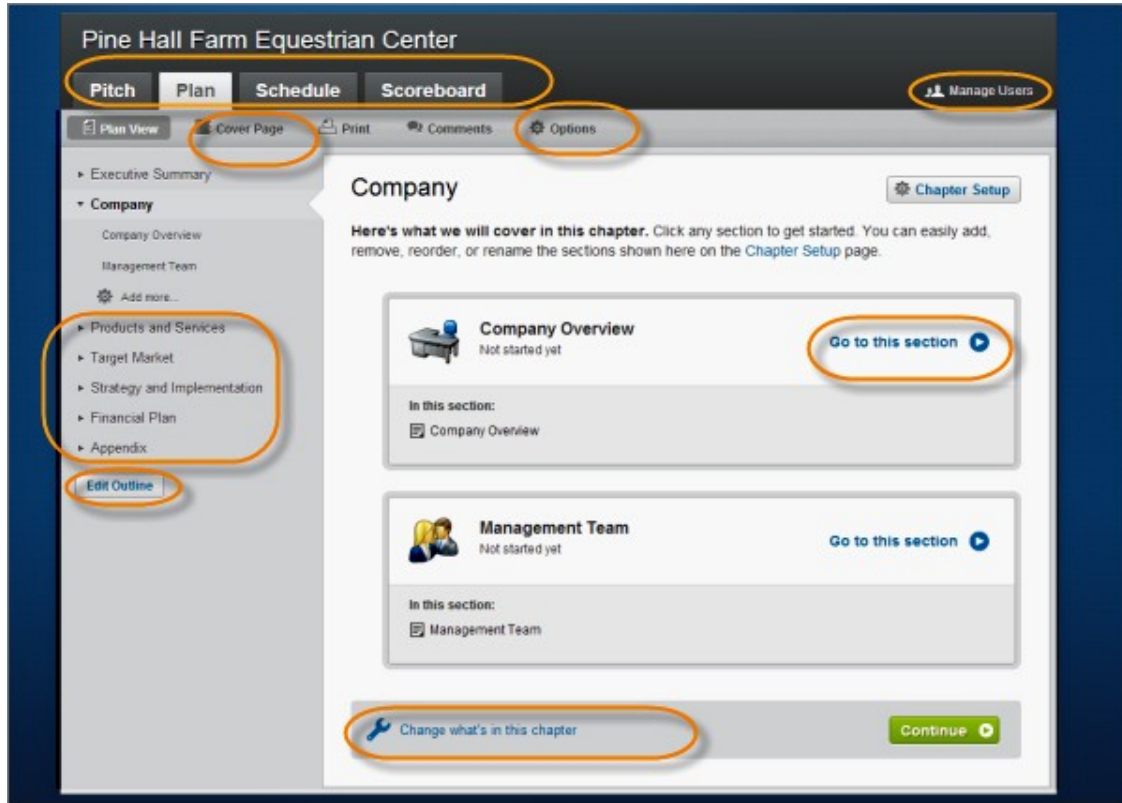
2. You may find it easier to start by selecting "Strategy" – though jumping immediately to your financials is also an option.



The screenshot shows a dialog box titled 'Where do you want to start?'. The text inside says: 'You can work through your plan in any order. The easiest places to start are generally with the written content or the numbers.' There are two buttons: 'Start writing your Strategy' (selected) and 'Start working on your Financials'. An orange arrow points to the 'Strategy' button. The background shows a blurred view of the 'Company' setup page.

3. The next frame that opens up presents a myriad of options. Don't let this throw you. What the Chapter Set-up Page does is allow you to work organically.

You can **add, remove, re-order** or **rename** the sections shown on the Chapter Set-up page.



This interface allows you to work in whatever way works best for your methods of processing information. It also allows you to organize your chapters.

You can jump straight to:

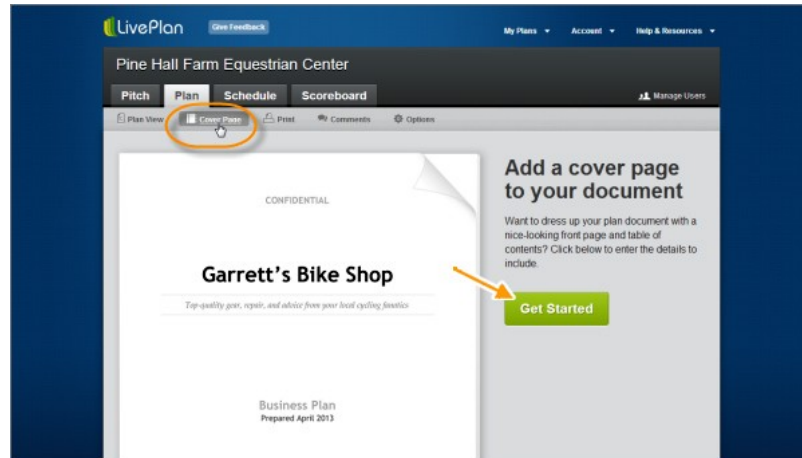
- Your Pitch
- Your Plan
- Your Schedule
- A Scoreboard – all using the horizontal tabs at the top of the interface.

If you want to manage your Users, simply click on the anchor text at the top right.



4. We are going to create our sample Start-up Plan in a chronological, linear fashion, beginning at the beginning.

Select "Cover Page" up in your horizontal menus: Then click the green "Get Started" button.

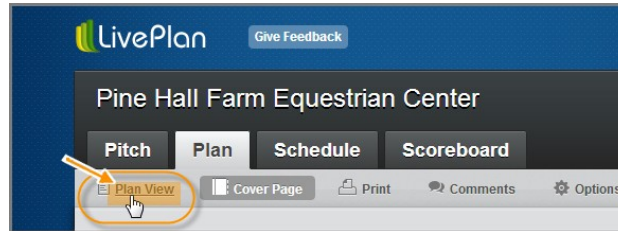


5. Enter your contact information and other cover page data; then press "Save Changes".

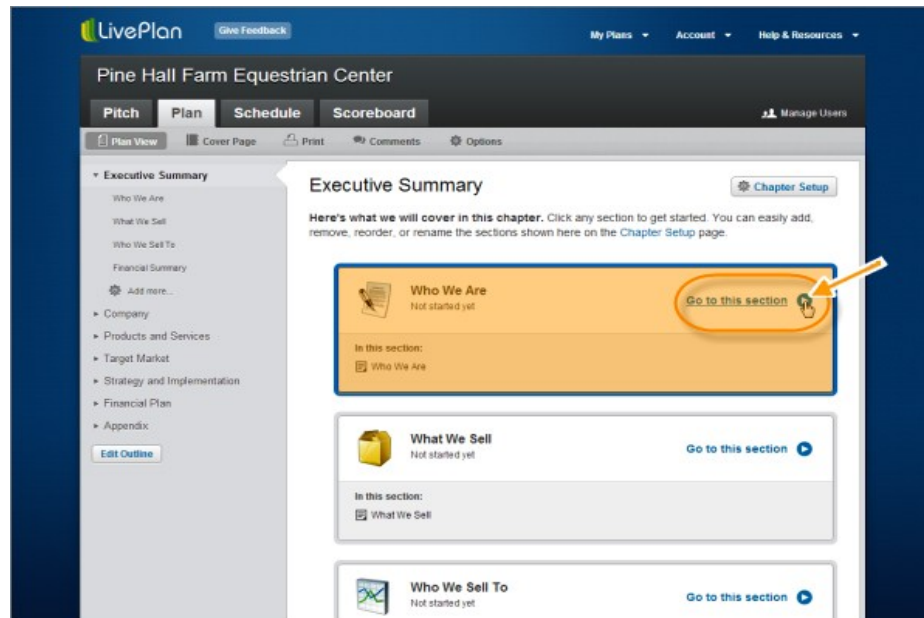
A screenshot of the 'Cover Page' configuration form in LivePlan. The form is titled 'Cover Page' with a 'Remove' link circled in orange. It contains several input fields: 'Company Name (required)' with 'Pine Hall Farm Equestrian Center', 'Slogan or Tagline' with 'Confidence through excellence', 'Street Address', 'City', 'State or Province', 'Postal Code', and 'Country' (set to 'Canada'). Below these are 'Contact Name (required)' with 'Jennifer Charles', 'Contact Email (required)' with 'jgc@pinehallfarms.com', 'Contact Phone' with '(807)', and 'Company Website' with 'pinehallfarms.com'. There is also a 'Confidentiality Message' field. A green 'Save Changes' button is at the top right, and another 'Save Changes' button is at the bottom right, highlighted with an orange arrow. A yellow callout box on the right asks 'Want to include a table of contents too?' with a checked 'Include a table of contents' option circled in orange.

Be sure to keep the radio button checked in the yellow Table of Contents box, if you want to include a fluid TOC, which will grow or shrink as your document does.

6. Once you've saved your changes, you won't see any sort of prompt as to what to do next. Simply go up to the top-left area of your screen, and click on the "Plan" tab, to return to your Chapter Set-up overview.

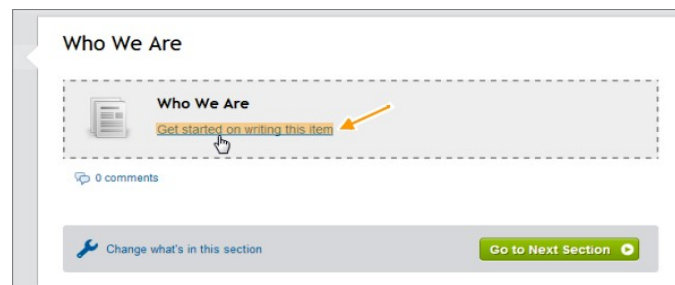


7. Next, write your Executive Summary. Remember Chapter 14? It's broken down, section by section, into an easy-input Executive Summary creation tool here. If you made any notes, now is the time to copy-paste them into your sections.

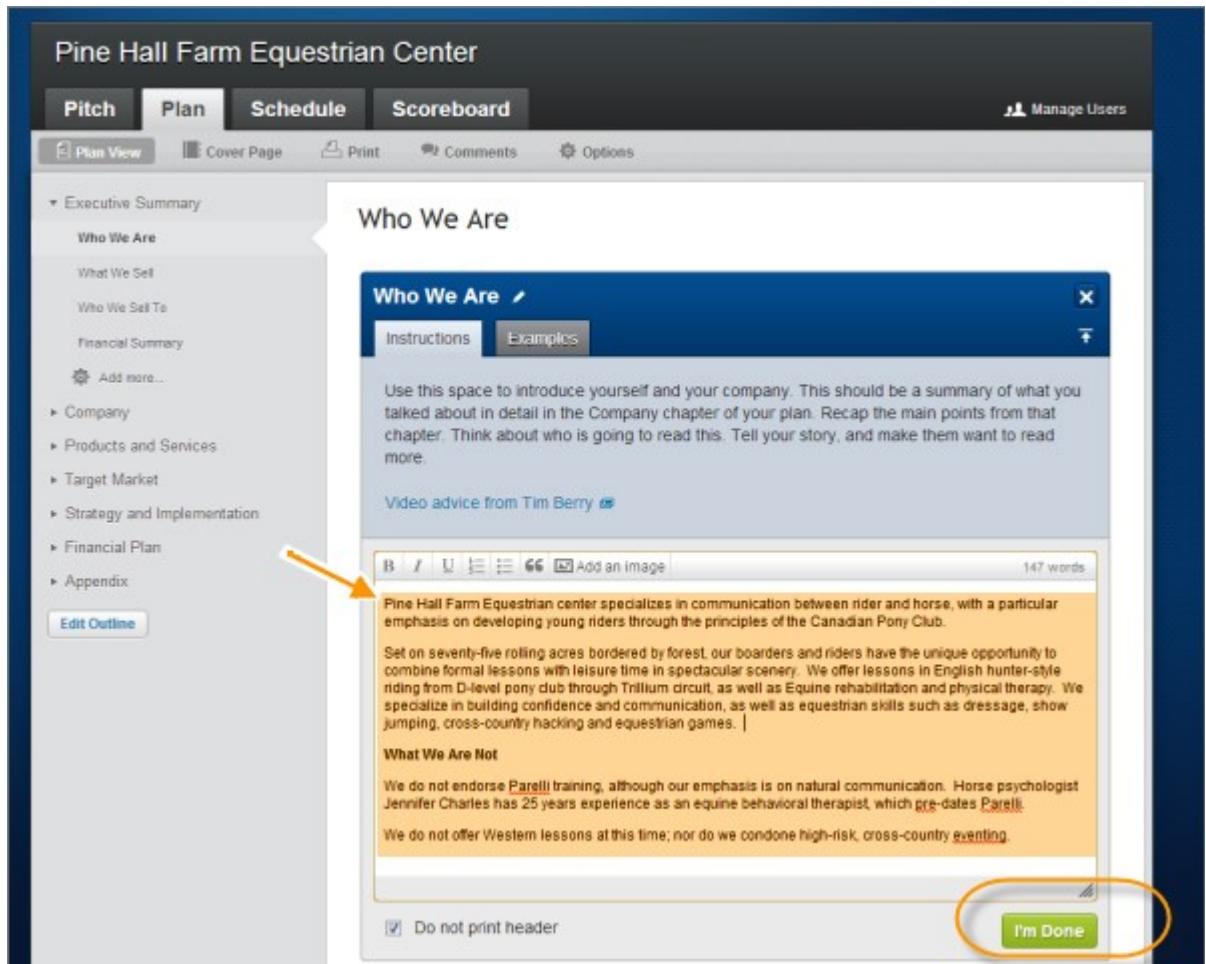


Just click on "Go to this section" within the "Who We Are" field

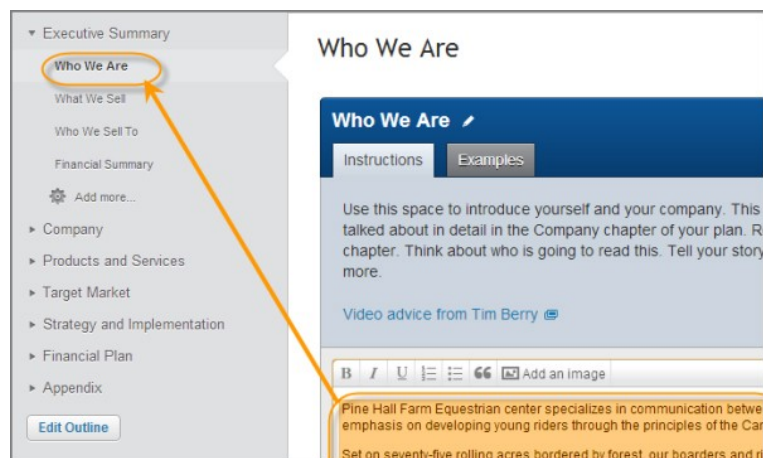
8. Confirm your selection.



9. Type or copy-paste in your data.



It's a good idea to open a simple text-editor such as Notepad, and copy-paste sections back and forward to your business plan Wizard entry fields. Keep referring to the left-hand menu for prompts as to what information should go in each field.



Don't worry about putting the "wrong" information in each field. You can always move text around by copying and cutting your text, selecting sections in the left-hand, vertical menu; then inserting your clipboard text.

You may also decide – at any time – to include a section detailing what your business is not, in order to narrow the focus for your market. These differences should be limited only to key discrepancies that might affect your investors' decisions; not minor ones. They should dis-qualify specific elements in your potential target market.

Don't be afraid to use specific industry terms – this shows you know what you're talking about – but do avoid jargon and "filler" phrases, whenever possible.

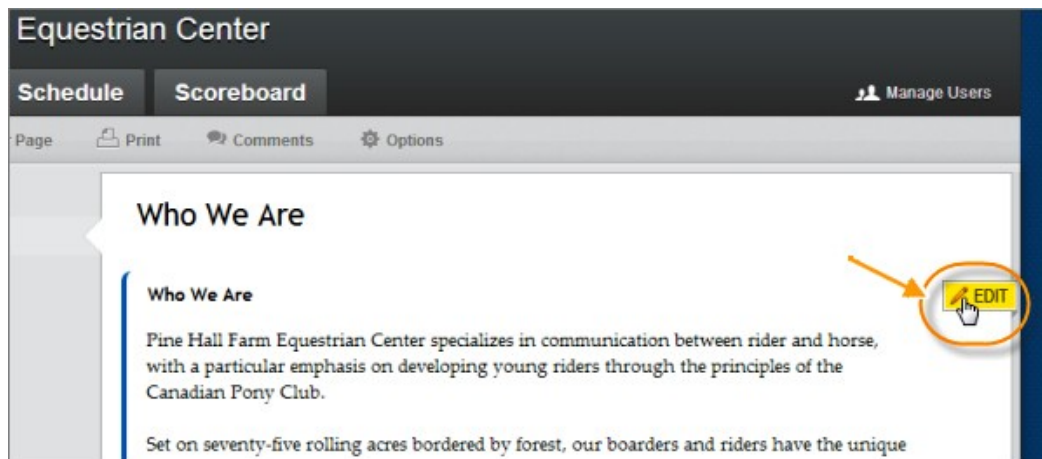
Be clear and direct.

Also be sure to proof carefully as you go. While LivePlan will underline obvious spelling mistakes, just as MS Word does, it doesn't catch such errors as a missing initial capital letter in titles.



10. Once you've finished, pressed the green "I'm Done" button. You'll immediately be able to see how your text will look as a finished product.

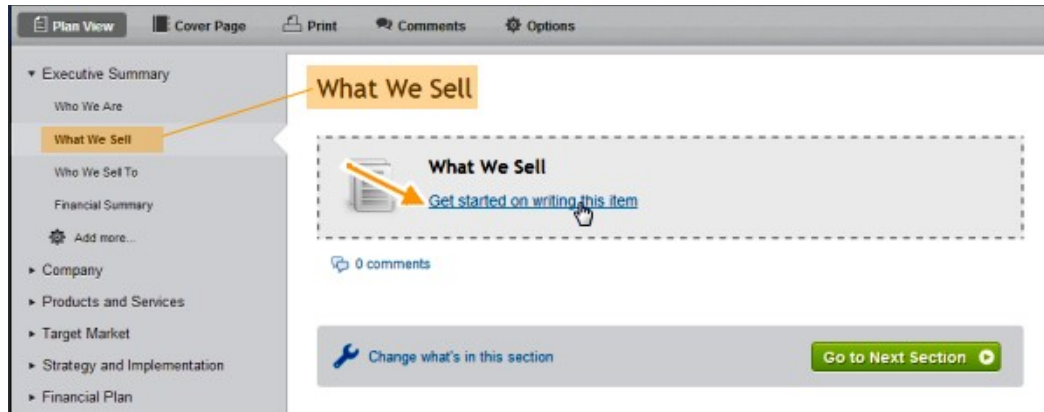
Note you can easily edit anything you want to check, simply by pressing the "Edit" button. (Tip: Single-space your sentences to avoid unwanted indents.)



11. When you're finished editing (or if it's fine, the way it is) press "Go to Next Section".

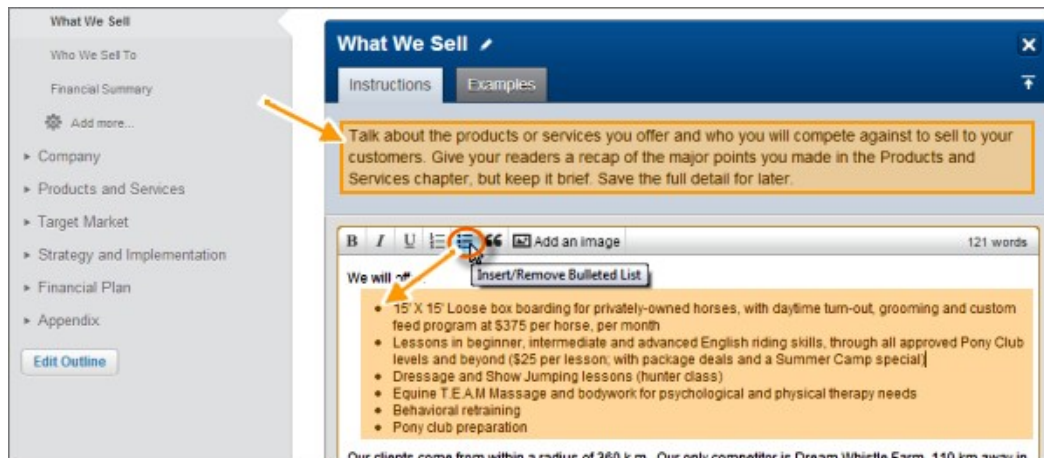


Repeat this process with the next section; and the next – all the way through the left-hand vertical menu – to complete your Executive Summary.



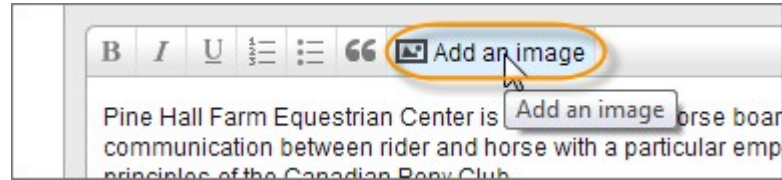
Pay particular attention to the tips contained within the "Instruction" area above the text area box (highlighted in orange).

Note also that you can apply common formatting commands to your text from the format bar – as well as add images.

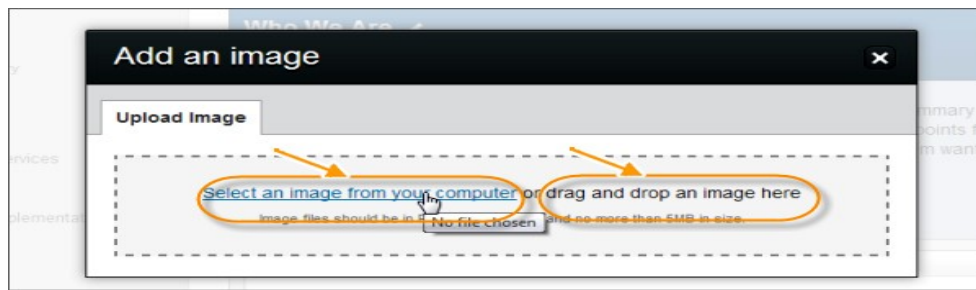


Step 4. Adding Images

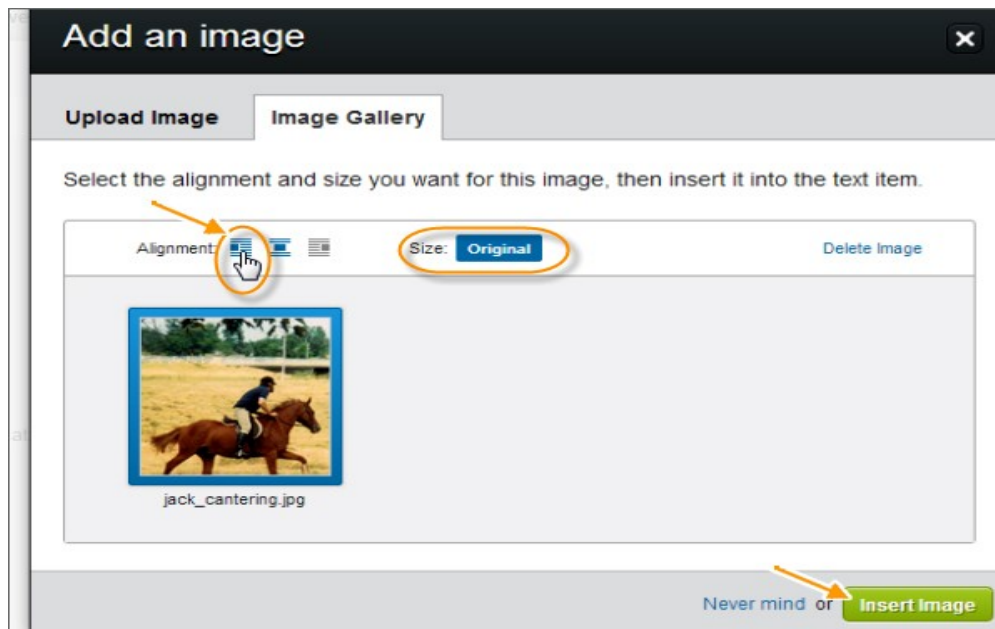
You can go back to any section at any time and add an image as easily as you add them to Facebook posts, or to your blog – in much the same way. Simply press “Add an image” in the formatting bar above the text area...



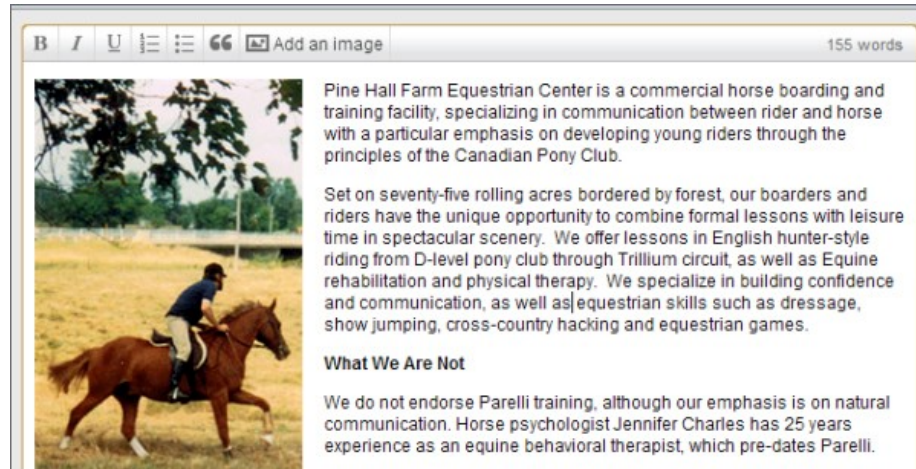
You'll be prompted to upload your image. You can either do so from your hard drive, or simply drag-and-drop your image from an open file or from your desktop into the image area.



Resize or align your image as you wish. Click the green “Insert Image” button when you are satisfied.



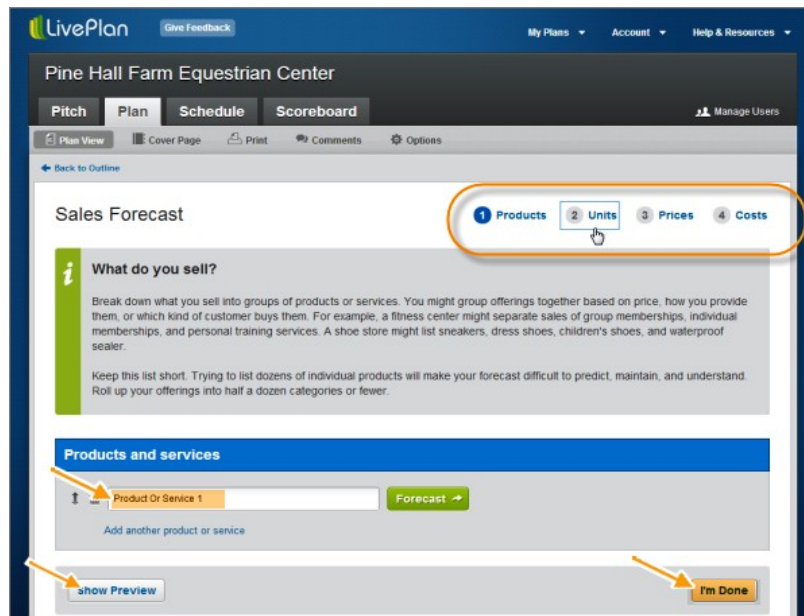
Once you press the button, you'll see your image nicely positioned within your document.



As you go through each section, be sure to pay attention to the “Instructions” box. In addition to tips for creating the most effective text, you will sometimes also find helpful video instruction from Tim Berry.

Step 5. Your Progress

Every section is as easy as the one before – even the financial data (which many people dread tackling). LivePlan does all the calculation and formatting for you. All you have to do is input your raw data and add it to your forecast or chart, one piece at a time.



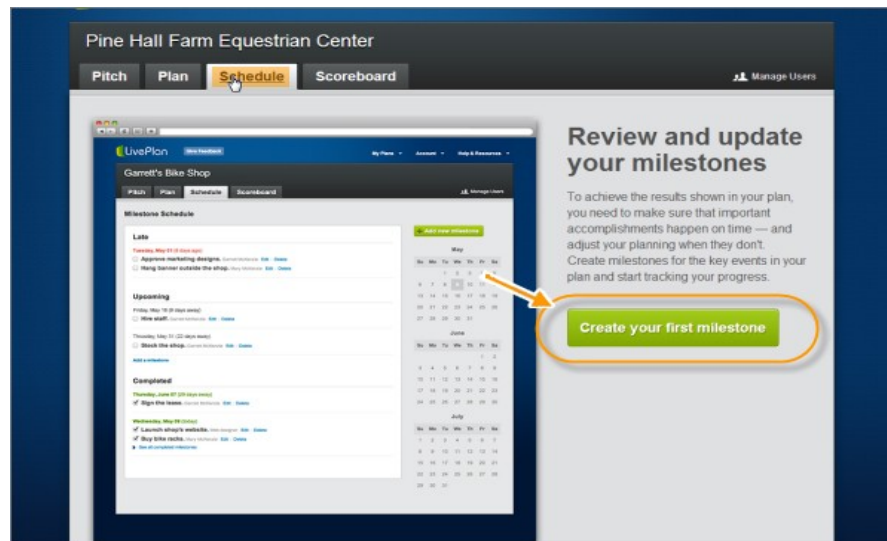
Notice you can check a preview at any time. (Remember to press the “I’m Done” button when you’re finished entering data!)

It’s painlessly easy to create charts, tables and forecasts. You can even connect directly to QuickBooks to integrate your data without having to manually input it.

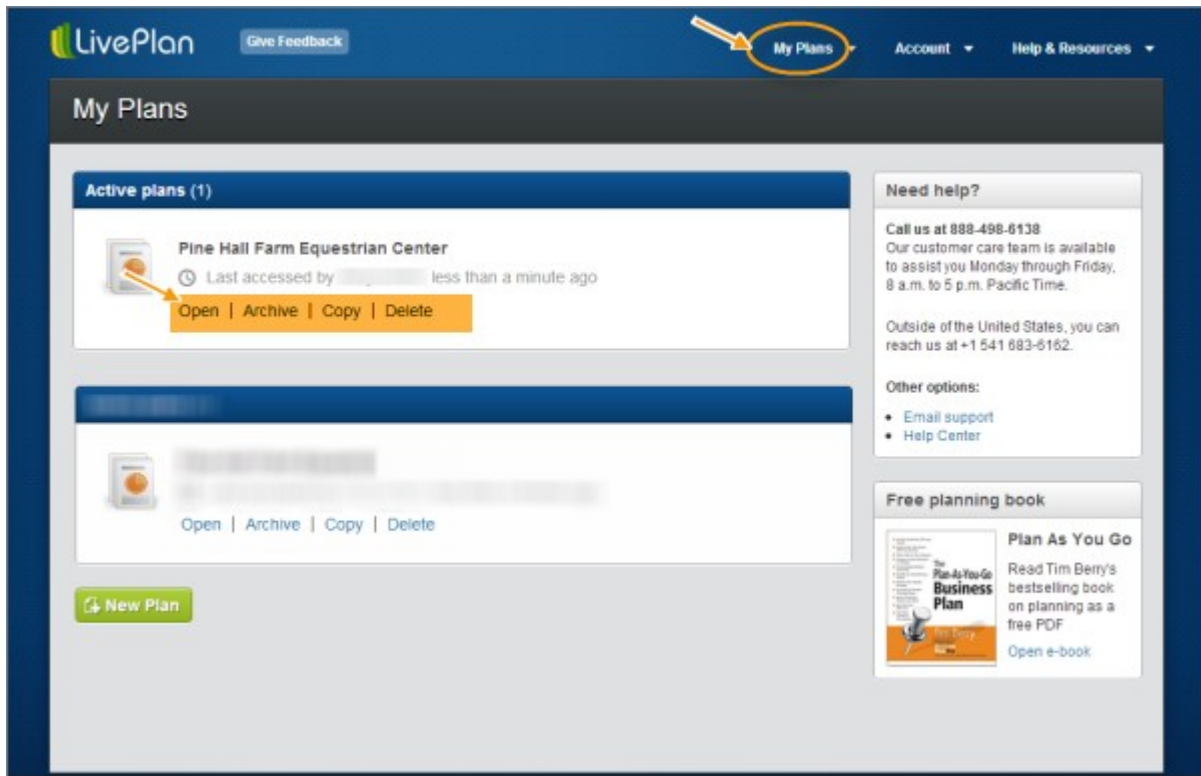


Scheduling – This is a wonderful feature, of which you can take full advantage. Your LivePlan Business Plan is a fluid, active document; and as your business progresses, you can refer to your Schedule and add achievements and Milestones.

Your schedule can be a wonderful tool for making sure you proceed on track and on time.



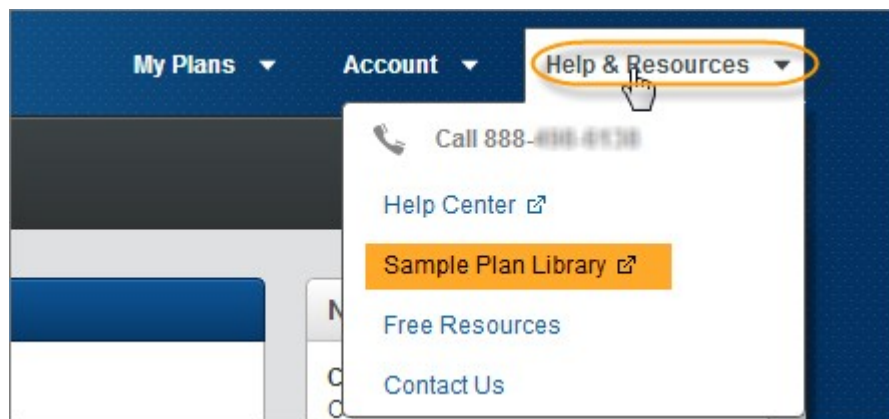
You can create as many business plans as you like, as well as returning to them any time to update, edit or even delete plans, simply by clicking on “My Plans” in your top menu bar.



And that’s really all there is to it – everything is made easy as clicking a button.

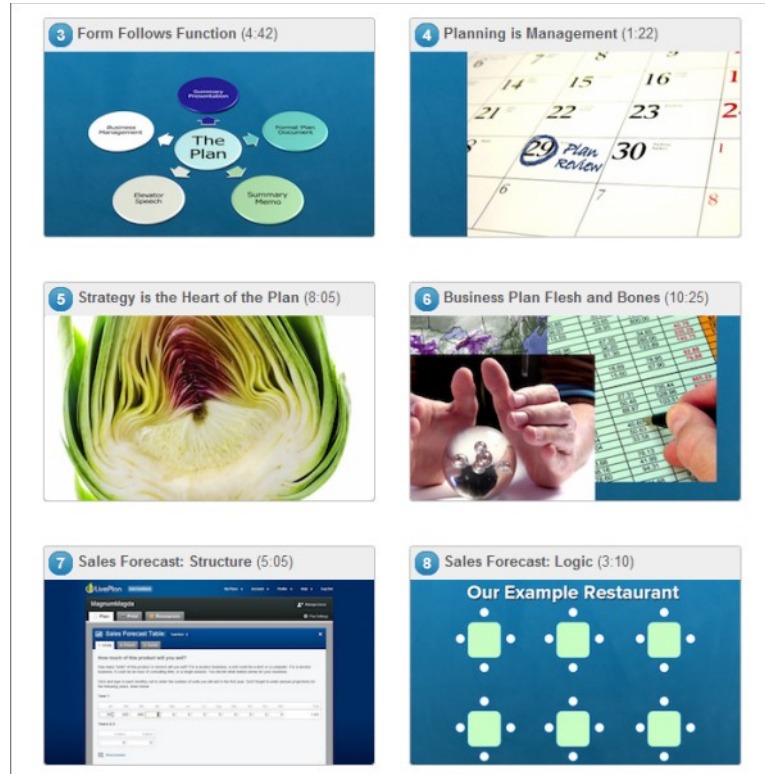
Step 6. Extras and Resources

But wait, there’s more... Specifically, a Resource section.



Here you will find the Sample Plan Library, the Help Center, LivePlan's toll-free Help number, an email contact link and a section packed with free resources such as:

- Industry research data sources and authority sites
- Legal resources and advice
- Legal forms
- Startup advice
- Funding sources
- Financial management instruction
- eBooks and reports
- Planning Tutorials – and many more resources and options



You can also send feedback to LivePlan.



Finally, be sure to read the instructions above every textarea box in your planning Wizards. Not only do the instructions tell you specifically what to do and how to do it, you'll also sometimes find helpful video links.



LivePlan is much more than a piece of Business Plan software – it's a resource kit, mentor and business education course, all in one go.

Canceling Your LivePlan Account

You can cancel your account at any time... but with all the resources and its ease of use, you may find you don't want to.

When you do cancel your account, you retain access for the rest of your paid month.

After that, **your data is deleted**.

A Viable Alternative – What do you do, if you don't want to lose all that data, but you're pretty sure you're not going to access your account for several months (or even a couple of years?)

LivePlan has one more gem of a solution up its sleeve: **It allows you to place your account "on hold"** for however long you want, for a nominal monthly sum (\$2.99 at time of writing).

That way you retain all your data and archives – and you can restart your monthly subscription any time you like.

LivePlan is a superb example of good business planning and growth – and that's just one more reason why you will find it exceeds its monthly value.