



Business Plan Outline

as of 9/29/15

As several of the teams are closing out Phase 1 of the Healthcare Access Mobility Design Challenge, and moving forward to de-risking (gaining greater confidence about) a single solution, we are supporting you in developing a human-centered business plan and a pitch.

1. A business plan provides a roadmap for customer outreach and marketing, operations, and financial sustainability, and
2. A presentation or “pitch” succinctly describes the solution to a specific audience.

Much of what will go into the *pitch presentation* will be drawn from your business plan.

Much of what will go into the *business plan* is based on the results of your Phase 1 and Phase 2 learning from desk research, co-creation activities, and other hypothesis testing. You have studied your chances for success and the impact your solution will have on people and communities. This plan gives you an opportunity to convey that knowledge to your core team, operating partners, and committed and prospective financial partners.

Below please find details about what to include in your business plan. A separate document contains support for developing your pitch.

Business Plan Outline

Adapted from the Sequoia Capital Business Plan Outline and other sources

"We like business plans that present a lot of information in as few words as possible....within 15–20 slides, is all that's needed."

Sequoia Capital website

a. Lead agency purpose

- Define the lead agency (or partnership) in a single declarative sentence.

b. Problem

- Describe the pain of the customer(s) (or the customer's customer).

⇒ This might include evidence of the problem from your application research and what you have learned during the design challenge.
- Tell how the customer(s) addresses the issue today, without the solution.

c. Solution

- Demonstrate your agency/partnership's Value Proposition to make the customer's life better.
- Show where your product/service fits into different arenas or sits within a community setting (e.g., fits in the health care value chain, in relation to delivering transportation services, etc.).
- Provide 1 or 2 use cases of how customers will use the service/solution. Tell or show this from the customer/stakeholder perspective. (Briefly, who the actor is, what her goal is, what steps she would take to use the solution, what people or systems with which she will interact when using the solution, how her goal is met.)

d. Why now

- Set-up the historical evolution of the transportation and health care space/interface.
- Define recent trends that make your solution possible.

e. Market size and opportunity

- Identify/profile the customers you will serve.
- Any other organizations/companies offering a similar solution in your geographic market?
- How many potential customers (individuals, organizations, or both) are in this market? In other words, what is the total possible demand for your solution?
- What portion of this market will you target? How many people could your current business model serve in a year, once in full operation?

- In the first few years of implementing this solution, what is the number or percentage of the market you will realistically reach? This will be based on a number of factors, such as the number of paid and volunteer staff you will initially have, the number of vehicles available to your network, etc.
- Identify any barriers which may hinder you as you are serving this market space, if any.

f. Service/Product

- Describe the offerings, activities, features and/or functionality of your solution.

⇒ If it will add value to your reader, describe your solution using a process map, service blueprint, sketches, video, etc.
- Describe the benefits of the service/product to your customers.
- As appropriate, list any intellectual property applied to this solution.

g. Business model (drawn from the most recent Building Blocks Canvas)

- What is your revenue model?
- What is your pricing strategy?
- How will you attract and onboard customers? What is your communication strategy for reaching customers?
- Through what channels will you deliver your solution?
- Who are your key partners and suppliers?

h. Team

- Describe your team (management, paid and volunteer staff, advisory board, etc.).
- Why is this team the right team to deliver this solution?

i. Financials

- Detailed, multi-year analysis of revenues, expenses, and projected cash flows.
 - ⇒ List all income/revenue sources, year by year for the first 3-5 years
 - ⇒ List all costs/expenses, year by year for the first 3-5 years
 - ⇒ List net income surplus or net income deficit for time period

Different organizations may wish to include additional financial information.

j. Funding request (if appropriate)

- State current funding requirements.
- State future funding requirements (3 to 5 years).
- How will you use the funds you receive?
- What are your long-term financial strategies?

Notes:

- ⇒ Appendices may include an organizational chart, data about prospective customer challenges, data about the market, a list of funding sources.
- ⇒ Plan to adapt this plan for different audiences.
- ⇒ Double check: Is this plan clear and to the point?
- ⇒ A business plan is a tool and a guidebook, but importantly, this is a living document and needs to be updated over time to remain relevant to the challenges your customers experience, as well as your opportunities to respond to those needs.