



Business Plan Development and Implementation Course: Financial Model and Roadmap

15 – 19 March 2027

London - Central London four-star



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Introduction:

Business plan development and implementation is the subject of this 5-day course for business unit heads, SME and new venture leaders, functional managers and planning analysts, who build a Business Plan with Financial Model and Implementation Roadmap for a case venture or unit. Many plans win approval or funding yet stall because revenue assumptions are untested, cash needs are understated and nobody owns the milestones after sign-off. Nominees already manage budgets or commercial targets, and teaching is by modelling build in a spreadsheet. CoreConcept Training Center delivers this business plan course.

Course Objectives:

- Structure a business plan for a named reader, whether a lender, an equity investor, a board or an internal funding committee
- Size the target market, profile customer segments and set out positioning and a value proposition backed by an evidence log
- Translate commercial, operations and people choices into a marketing and sales plan, a resource plan and a hiring schedule
- Build a spreadsheet financial model linking revenue build-up, costs, projected statements, monthly cash flow and peak funding need
- Test the plan with break-even analysis, sensitivity tables, downside and upside scenarios and a risk register
- Convert the approved plan into milestones, an implementation roadmap, KPIs and a monthly plan-versus-actual review, and present it in an executive summary and pitch

Target Audience:

- Business unit heads accountable for growth targets, unit budgets and requests for internal investment
 - SME owners and new venture leaders preparing plans for bank finance, investors or partners
 - Functional managers who must turn a new product, service or site into a funded and staffed plan
 - Planning and business analysts who prepare the numbers, assumptions and models behind a plan
 - Finance business partners who review the cash flow, funding need and repayment capacity in plans
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Course Outline:

Day 1: Business Plan Purpose, Readers and Plan Architecture

- Lender, Investor, Board and Internal Funding Reader Requirements
- Business Plan Section Map from Executive Summary to Appendices
- Opportunity Statement and Plan Scope for Venture or Unit
- Evidence Log for Market, Cost and Capacity Assumptions
- Current-State Baseline of Revenue, Margin and Headcount Figures

Day 2: Market Case, Positioning and the Commercial Plan

- TAM, SAM and SOM Market Sizing from Data
- Customer Segment Profiles and Purchase Criteria Ranking Grid
- SWOT and Competitor Comparison Table for Positioning
- Value Proposition Statement and Price Point Rationale
- Marketing and Sales Plan with Channel Funnel Targets

Day 3: Operations, People and the Spreadsheet Financial Model

- Operations and Resource Plan with Capacity and Supplier Needs
- Organisation Chart, Hiring Sequence and Payroll Cost Schedule
- Revenue Build-Up Model by Volume, Price and Channel
- Operating Cost, Capital Expenditure and Depreciation Schedules
- Projected Income Statement, Cash Flow and Balance Sheet Links

Day 4: Funding Need, Sensitivity and Plan Risk

- Break-Even Analysis with the Contribution Margin Ratio
- Peak Funding Requirement from the Monthly Cash Flow Curve
- Debt Service Coverage and Equity Return Views for Funders
- Sensitivity Tables and Base, Downside and Upside Scenarios
- Business Plan Risk Register with Triggers and Mitigations

Day 5: Modelling Build of the Business Plan and Implementation Roadmap

- Case Venture Data Pack and Model Assumptions Sheet
 - Milestone Gantt Chart and Implementation Roadmap with Owners
 - KPI Dashboard and Monthly Plan-Versus-Actual Review Routine
 - Executive Summary Drafting and Pitch Deck Storyline Build
 - Business Plan with Financial Model and Roadmap Completion
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Skills You Will Gain:

- Business Plan Structuring
- Market Sizing
- Competitive Positioning
- Revenue Build-Up Modelling
- Cash Flow Forecasting
- Break-Even and Sensitivity Testing
- Implementation Roadmapping
- Plan Performance Monitoring

Why Attend This Course:

- Deliver a Business Plan with Financial Model and Implementation Roadmap to the sponsor, funding committee or lender who decides on the venture or unit
- Judge whether a plan's revenue assumptions and funding request are strong enough to submit, or need more evidence first
- Avoid cash shortfalls, unfunded hires and stalled launches caused by plans that stop at approval
- Pass on the model template, risk register and plan-versus-actual routine to colleagues who prepare future plans

Conclusion:

Back at work, the participant hands the Business Plan with Financial Model and Implementation Roadmap to the sponsor, funding committee or lender, who use it to decide whether to fund, launch or expand the venture or unit. Line managers take the roadmap milestones and KPI dashboard into their monthly reviews, and finance colleagues reuse the model for budget and cash discussions. After the first quarter of implementation, the unit should compare actual revenue, costs and cash against the plan and update the assumptions sheet and risk register.

Frequently Asked Questions FAQ:

What should participants prepare before a business plan development and implementation course?

Participants should be comfortable with basic spreadsheet formulas and know how their unit's revenue and costs are reported. Bringing an idea, a unit expansion or a funding request they may plan helps them apply each modelling exercise to a real case.

How does this business plan development and implementation course differ from a strategic planning course?

This course produces one funded plan for a single venture or unit, with a working financial model and implementation roadmap. A strategic planning course works at whole-organisation level on direction, strategic options and portfolio choices, with far less financial modelling.

What do lenders and investors look for in a business plan financial model?

Lenders look mainly at cash flow, debt service coverage and repayment capacity, while equity investors look at growth, margins and the return on their stake. Both expect clear assumptions, a break-even point, a stated funding need and tested downside scenarios.

What does a participant take back to work from the business plan development and implementation course?

Each participant takes back a Business Plan with Financial Model and Implementation Roadmap for a case venture or unit, including a market case, cash flow projections, a risk register, milestones and a KPI dashboard ready for adaptation to their own plans.
