

Business Plan Creator

Instructions

Getting started with your plan is very simple; just follow these instructions and you will be well on your way to having a professional plan that will serve you for years to come – provided you review it and constantly update it.

Step 1 – Login

Click on the Business Consulting Menu item in the left margin. Once open click on the “Login” if this is your first time you will be asked to create a login. You must do this to go forward.



Step 2 – Create a New Account

In put your login information. If this is your first time you will have to “Create a New Account” and a

password that you have selected.

Step 2(a) shows the page you will see to set up your account.

You will select a user name and a password will be sent you the email address you submit. Once you receive the password you should log in and then edit your account and change your password to something that is easier for you to work with.



Step 2(a) New Account Setup



Step 3 – Client Resources Page

Now that you are logged in you can start your plan or you Cash Flow Forecast (which is a part of the



plan). The next screen is what you see to make your selection. You can even book a seminar from this page.

Make your selection; in this case we will choose “Business Plan Creator” and go to the BPC Home page.

Step 4 – Business Plan Creator Home Page

This next page is an information page and I suggest that you review. There is a great deal of very



important information on this page and it can make your efforts much more effective. This is the Business Plan Home Page and when you click on the button at the top you will actually go to a separate website used exclusively for the Business Plan Creator.

Step 5 – The Plan Creator

You are now in the actual Business Plan Creator website. The first thing you see is the section Are

you ready to start your business plan? The text that follows will aid you in getting started. The next thing you will notice is the “Progress Summary”, this box will chart your progress as you work through your plan.

In the bottom is the “Download Document” and “Preview Document” buttons you will use these once your document is nearing



completion or at anytime you want to have a preview of how the document will look when sent to Word. When it is downloaded to Word it is in Rich Text Format (RTF) and you will add the formatting you like to dress up your document as you like once downloaded.

Now let's get started; on the dark green margin on the left are a series of topics choose anyone and it will open a submenu of additional topics – just select the sub-topic you want to work on and it will open the plan for you.

In the example to the left we have chosen to start with the “Business Profile” and the sub-section

“Vision Statement”. The screen opens and the question(s) relating to this topic are displayed with a box below for you to enter your plan information. Notice the blue Question mark, click on this for additional tips on the topic you are working on.



Step 6 – Getting help

While working on your plan you may find that you would like some help or comments on your progress.



You need only send an email to your consultant advising them of what section you are working on and what your concern is. In the example below you will see a new box at the bottom where your consultant can put in their comments for you.

You should now have a good grasp of how to work through your plan –

Good Luck