

Consulting Business Plan

Use this template to turn your expertise into a defined service business. Replace bracketed text with your positioning, packages, delivery capacity, and financial assumptions.

BUSINESS	PREPARED BY	DATE
[Business name]	[Your name]	[Month and year]

01 Business Overview

What the business is, who it serves, and why customers will choose it.

Service business summary

[Business name] helps [type of client] achieve [specific result] through [service]. We work with clients in [market or area]. Our goal for the next year is [revenue, client, or delivery goal].

Ideal client and buying trigger

Our best-fit client is [size, sector, budget, and decision maker]. They look for help when [trigger]. Their current alternative is [in-house work, competitor, or doing nothing], which creates [gap].

Service packages and positioning

Our core package is [name] and includes [deliverables, timeframe, and revision limits]. The price is [amount or pricing approach]. Out-of-scope work is handled through [change process]. Our difference is [specific expertise or delivery advantage].

Proof and demand

We can support our offer with [relevant work, qualifications, references, or pilot results]. Feedback from [source and date] suggests [finding]. We will test willingness to pay through [proposal or paid pilot] before scaling.

WHAT MUST BE TRUE

The three assumptions that matter most are [assumption one], [assumption two], and [assumption three]. We will verify them through [evidence or test], with a decision date of [date].

02 Marketing & Operations

Turn the plan into specific actions, owners, and measurable results.

Lead generation and sales

We will generate opportunities through [referrals, outreach, partnerships, or content]. The sales process is [enquiry, discovery, proposal, agreement, payment]. [Owner] will track qualified leads, proposal wins, and time to payment.

Delivery and capacity

Each [project or retainer] requires approximately [hours] of delivery time. With [available billable hours] per month, we can serve [capacity]. We will use [workflow] for scope approval, quality checks, handover, and client feedback.

People and working arrangements

[Name] handles [sales, delivery, and administration]. Specialist work is covered by [contractor or partner]. Confirm agreements, professional requirements, insurance needs, confidentiality, and the planned business structure for your situation.

The next 90 days

WHEN	ACTION AND SUCCESS MEASURE	OWNER
First 30 days	[Validate the most important assumption and record the result]	[Name]
Days 31–60	[Launch or improve the first offer and measure response]	[Name]
Days 61–90	[Review results and decide what to change or expand]	[Name]

WEEKLY REVIEW

Review [customer demand, quality, sales, margin, and cash] every [day]. Record what changed, what was learned, and the next action. Update this plan when the evidence changes.

03 Financial Plan

Currency [Code] · Planning month [Month and year] · Replace every placeholder with a supported estimate. This worksheet does not calculate automatically.

ASSUMPTION OR RESULT	YOUR ESTIMATE
Average revenue per project or retainer	[Amount]
Projects or retainers per month	[Count]
Variable cost per sale or customer	[Amount]
Fixed operating costs per month	[Amount]
Monthly revenue = average revenue × volume	[Amount]
Operating result = revenue – variable costs – fixed costs	[Amount]
One-time startup spending	[Amount]
Cash available before startup spending	[Amount]

NOTE Use one consistent unit. Compare forecast projects with billable capacity. Variable costs may include subcontractors; fixed costs may include owner pay, tools, and insurance.

Funding and cash timing

The business will be funded by [source]. Startup needs include [tools, equipment, training, and working capital]. The available opening cash is [amount]. Record deposits, payment terms, and likely collection delays separately.

Main risk and response

RISK	Scope creep or late client payment.
RESPONSE	Use clear deliverables, written change approval, agreed payment milestones, and an overdue-invoice process.
EARLY WARNING	[Measure that signals trouble], owned by [name], reviewed on [date].

Supporting documents

Attach [dated market evidence, quotes, resumes, agreements, permits, and detailed financial schedules] as relevant. An external reader may require additional statements or projections.

CASH Operating result is not the same as available cash. Model collection delays, taxes, loan payments, stock purchases, later funding, and other cash movements separately.