

Organisation Plan Templates

Set up for success with strategic planning frameworks, including Lean Canvas, SWOT Analysis, Pirate Funnel, and more.

Source: [canva.com](https://www.canva.com)



Planning and
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Create a Organisation Plan with a Lean Canvas

Lean canvas is a one-page business plan template created by Ash Maurya. It's designed to create a snapshot of your business idea, distill the essence of your product or service, and break it down into key parts. Check out a completed example on the next page and then try filling out the blank lean canvas for your own organisation on the page after that.



● Problem

What problems are people facing? List their top 3 frustrations.

● Solution

How will you solve these problems? Write down a solution for each problem.

● Unique Value Proposition

How will you turn an unaware visitor into an interested customer? Create a clear and compelling one-liner message you want to send across.

● Unfair Advantage

What separates you from competitors? What makes you ahead of the pack?

● Customer Segments

Create 3 to 4 persons of the people you can help. Visualize these people who will turn to you for solutions.

● Existing Alternatives

How are these problems solved today? This can be a direct competitor to what you are offering or the existing ways people are employing to address their problems.

● Key Metrics

How will you measure the success of your product or service? List the key metrics.

● High Level Concept

How does your product or service fit into the grand scheme of things?

● Channels

How will you reach your target consumers? Direct marketing, social media, ads, partnerships — identify the effective ways to reach them.

● Early Adopters

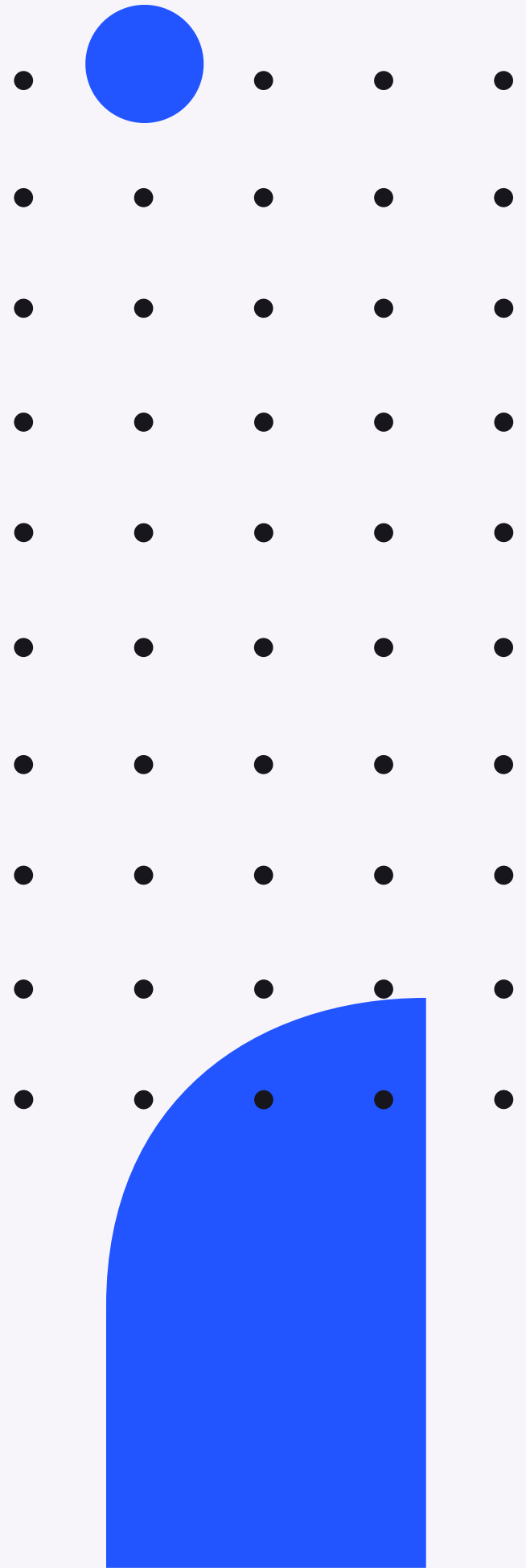
What are the specific characteristics of your early adopters?

● Cost Structure

What are the fixed and variable costs to launch your product or service? Consider the cost at each stage from setting up a website, hiring employees, production, marketing, and bringing them to consumers.

● Revenue Streams

What money sources will grow your money? How will you generate income? Show a pricing model of your product or service and include other revenue sources, such as sales and subscription fees.



SWOT Analysis

Find Your Competitive Position with a SWOT Analysis

A SWOT analysis maps out your organisation's path towards your goals by identifying strengths and weaknesses (internal attributes) and opportunities and threats (external conditions). Uncover your organisation's competitive position with these guiding questions. Use the blank framework on the next page to start filling out your own SWOT analysis.



● Strengths

What advantages does your organisation have? What do you do better than anyone else? What are your unique selling points?

● Opportunities

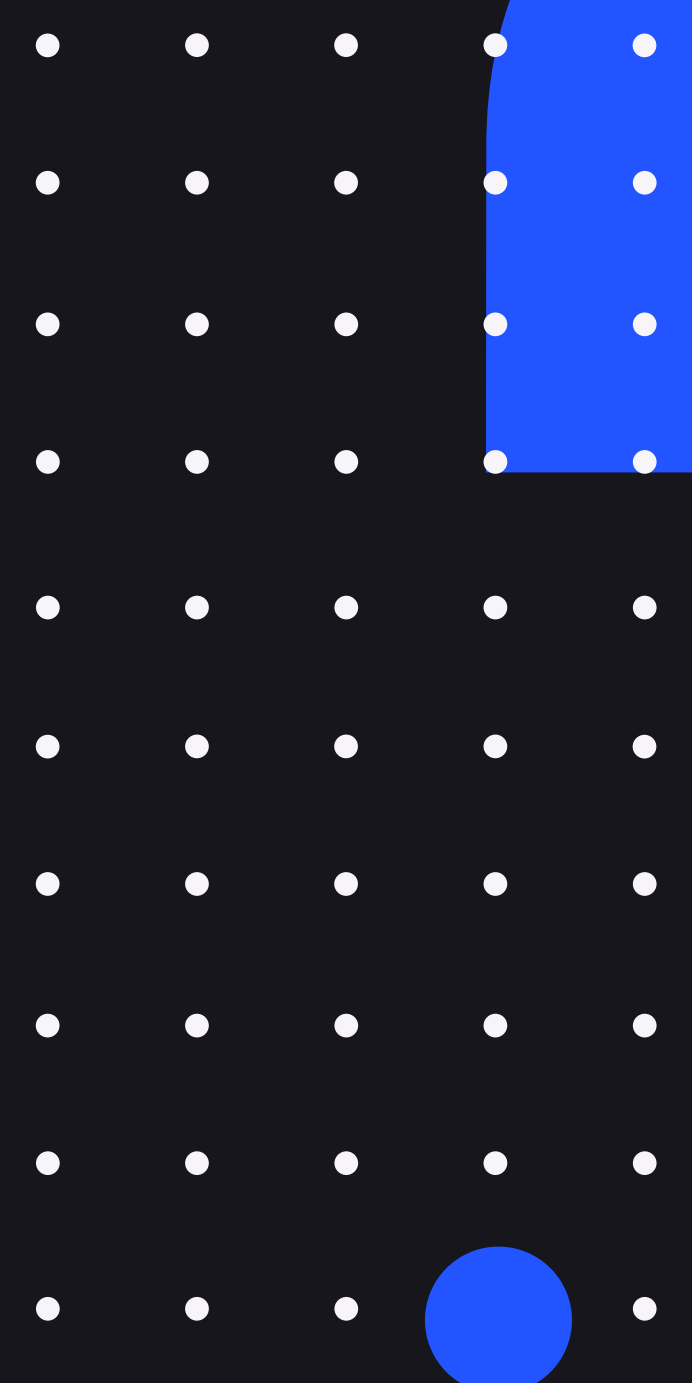
What changes in technology, policies, and social patterns can be a growth opportunity for the organisation?

● Weaknesses

What areas can you improve on? What does your organisation lack? What things do your competitors do better than you?

● Threats

What are the obstacles to your organisation's growth? Who are your competitors? What changing factors can threaten your organisation's position?





Visualize Your Organisation's Weak Points with a Pirate Funnel

The Pirate Funnel is a customer-lifecycle framework by Dave McClure that shows what you need to focus on to optimize your marketing funnel. It is called a Pirate Funnel because the first letters spell out AAARRR for Awareness, Acquisition, Activation, Retention, Referral, and Revenue. Use the blank framework on the next page to start filling out your own pirate metrics.





● Awareness

How will you introduce your organisation to your potential customers? Examples: impressions, click-through rate, visits, and social media metrics.

● Acquisition

Where are your potential customers coming from? What channel is driving the most valuable traffic for your organisation? Examples: new leads, email subscribers, support and sales chats.

● Activation

How will your potential customers try your product or service for the first time? Examples: new trial signups, product sales, activation after app download.

● Retention

How many of your customers are you retaining? Why are you losing others? Examples: customer acquisition rate and customer churn rate.

● Revenue

How can you increase revenue? What's your monetization plan? Examples: customer acquisition cost and customer lifetime value.

● Referral

How can you turn your customers into advocates? What's your systematic process to generate referrals consistently? Examples: Net Promoter Score, referrals, and social shares.





4Ps of Marketing

Position Your Product or Service with the 4Ps of Marketing

The 4Ps of Marketing illustrates how product, price, place, and promotion work together when a product or service is launched to customers. It is created by Neil Borden in the 1950s to demonstrate the ways companies use advertising and marketing techniques to convert potential buyers into actual customers.



● **Product**

- **Brand**
- **Features**
- **Packaging**

Product refers to the good or service you are offering to customers. What needs does this product fulfill? What frustrations does it address? What makes it compelling to customers such that they will believe they need to have it?

● **Price**

- **Price**
- **Discounts**
- **Bundling deals**
- **Credit terms**

Price is what customers pay for a product or service and it takes into account the cost of production. Are there established price points for this product or service in the market? How will this price compare with competitors?

● **Promotion**

- **Ads**
- **PR**
- **Social Media**
- **Email**
- **Search Engine**
- **Video**

Promotion is how you will get the word out about your product or service to your target customers. It includes advertising, public relations, and promotional strategies.

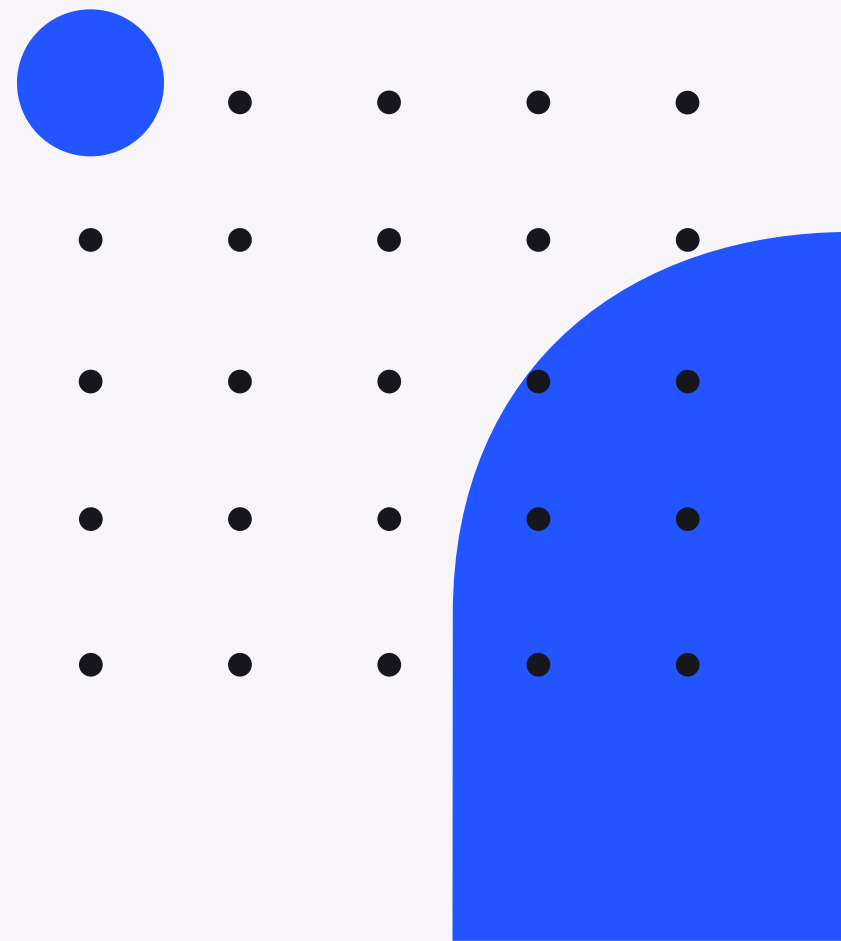
● **Place**

- **Stores**
- **Website**
- **Online**
- **Marketplace**

Place refers to how and where your customers will look to see your product or service. Will it be in a physical store or online? What will be the distribution channels?



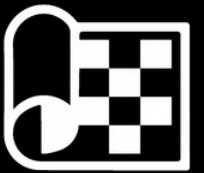
Product- Market



Establish Your Product's Appeal with a Product- Market Fit Pyramid

Finding Product-Market fit is the difference between struggling to find customers and having them knocking down your door for your product. Use the blank framework on the next page to start filling out your own Product-Market Fit Pyramid.





1. Identify your target customer.

Use market segmentation and create persons to get a picture of the people you are targeting. No need to be precise. A high-level hypothesis is enough to start testing, and revise as you go.

2. Know “undeserved” needs.

What needs do they have that are adequately met?

3. Define your value proposition.

How you will meet your customers needs better than your competitors? Of all the needs you can address with your product, which ones will you focus on?

4. State your MVP feature set.

Build only what is needed to create enough value for your target customers to validate the direction of your product.

5. Make your MVP prototype.

Apply user experience principles to receive feedback and to bring your feature set to life for your customers.

6. Test it out to your customers.

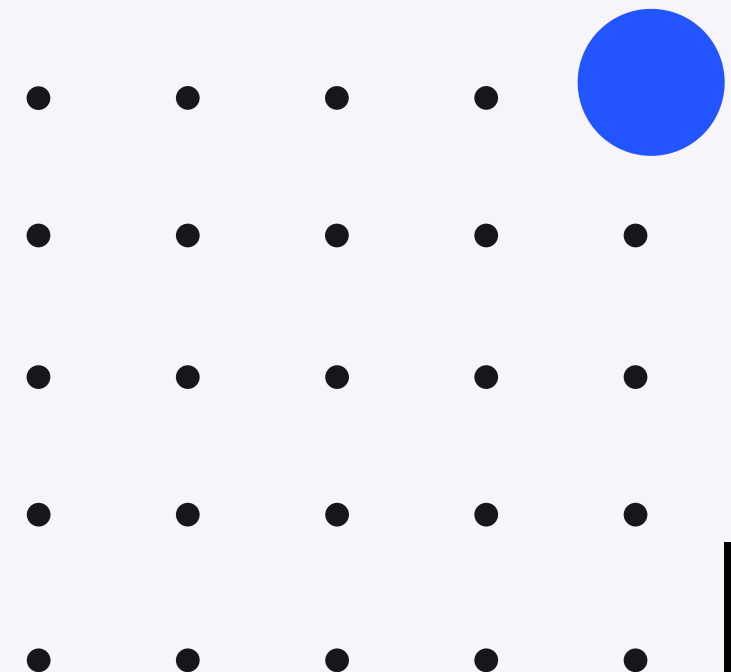
Ensure you are testing with your target market so feedback received will help iterate your product in the right direction. Making your test group answer a survey is a great way to ensure they possess the attributes of your target customer.



Know the Stages of the Customer Journey with a Marketing Funnel

A Marketing Funnel maps your organization's marketing activities at each stage of the customer journey. It starts with making your target audience aware of your solution, then guiding them through an evaluation process and finally leading them to make a purchase. Use the blank framework on the next page to start filling out your own marketing funnel.

Marketing Funnel

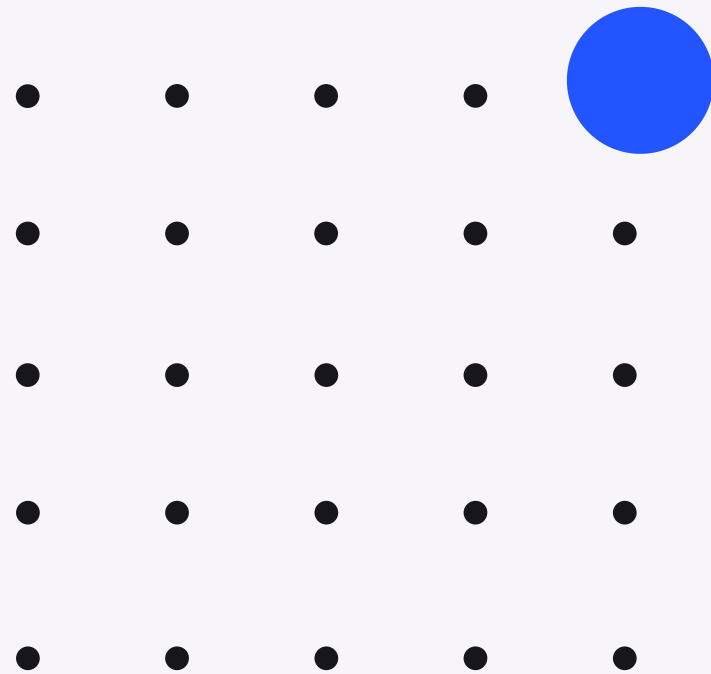


State Your Organisation's Mission, Vision, and Values

Clearly defining your organisation's mission, vision and values is a powerful way to align your team and reach your goals. Use the blank framework on the next page to start filling out your own mission, vision, and values.



Mission, Vision, and Values



Mission

Mission is the reason why your organisation exists. It is the visible and tangible effect you want your organisation to create for your customers and the world.

Vision

Vision is what success looks like for your organisation. It is what your organisation aspires to be in the future. It is how the world will look like once you've accomplished your mission.

Values

These are the guiding principles that will influence your actions to fulfill your organisation's mission and vision.





Illustrate Your Company's Strategy, Tactics, and Execution

A strategy, a list of tactics, and knowing how to execute them are integral in the attainment of your organisation goals. Use the blank framework on the next page to start filling out your own strategy, tactics, and execution

Strategy, Tactics, and Execution



Strategy

Strategy is how your methods, time, and resources come into play to fulfil your organisation mission and vision.



Tactics

Tactics are the specific methods, resources, and techniques you will need to accomplish your strategy.

Execution

Execution is how you will employ the tactics you've chosen. It includes measurable outcomes, such as timelines and deliverables.



Develop Deep Insights About Your Customers Using Buyer Persons

Buyer persons are semi-fictional representations of your target customers. These persons are based on market research and real data about the people you are targeting. Two to three buyer persons are ideal. The more detailed the buyer person, the better. Use the blank framework on the next page to start filling out your buyer persons.

**Buyer
Persons**



- **Demographics**

(Gender, age, marital status, employer)

- **Needs**

- **Buyer's Journey**

(Awareness, consideration, purchase, advocacy)

- **Buying Roles**

(Decision makers, influencers)

- **Objections**

- **Channels**

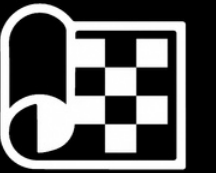
(Social media, other digital activities, non-digital activities)

- **Goals and Responsibilities**

- **Frustrations**

- **Sources of information**

(Content that influences purchase decisions)



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