[Agency name] Business Plan

[Month Year] · Version 1.0 · Prepared by [name]

How to use: fill sections 2, 3 and 7 first, write section 1 last, mark guesses as assumptions and review every 90 days.

1. Executive summary

Write this section last. Five sentences, and every number must match section 10.

- [Agency] helps [ideal client] get [outcome] through [2-3 services].
- We sell [number] monthly packages from $[X] to $[Y].
- Today: [N] clients and $[monthly revenue]. Target: [N] clients and $[monthly revenue] by [month/year].
- What makes us different: [one specific thing a client can check].
- Funding: self-funded with $[X] / we need $[X] for [use].

2. Niche and ideal client

Fill this first. Be specific; "small businesses" is not a niche.

- Industry: [ ] Company size: [ ] Location: [ ]
- Monthly marketing budget: [ ] Decision maker: [ ]
- Top 3 problems they pay to fix: [1] [2] [3]
- What triggers a purchase: [ ] Where they spend time: [groups, events, platforms]
- Who we will NOT take on: [budget floor, industries]

3. Services, packages and pricing

Fill this first. One row per package.

- Pricing model and why: [retainer / project / hourly advisory / performance]
- Setup fee: [ ] Paid add-ons: [ ] Ad spend billed: [client pays platform / % of spend]
- Unit economics: delivery hours x cost per hour = delivery cost; price / delivery cost = markup (aim for about 3x).

Package	Price/mo	Deliverables	Not included	Turnaround	Revisions	Best for

4. Market and competitors

Real competitors in your niche, not global market statistics.

- SWOT - Strengths: [ ] [ ] [ ] Weaknesses: [ ] [ ] [ ]
- Opportunities: [ ] [ ] [ ] Threats: [ ] [ ] [ ]

Competitor	Services	Price range	Strength	Gap we fill

5. Marketing plan for the agency

How you will win clients for your own agency.

- Main channel: [ ] Support channels: [ ] [ ] Entry offer: [e.g. free audit]
- Monthly marketing budget: $[ ] 70-20-10 split: proven $[ ] / improving $[ ] / tests $[ ]
- 3-3-3: messages [ ] [ ] [ ] x audiences [ ] [ ] [ ] x channels [ ] [ ] [ ]
- Monthly targets: leads [ ] calls [ ] proposals [ ] new clients [ ]

6. Sales process

From first enquiry to signed deal.

- Stages: enquiry > call > proposal > signed > first invoice or deposit > onboarding
- Proposal follow-up rule: [ ] days Expected close rate: [ ]% Deposit policy: [ ]

7. Operations

Fill this first. How client work moves from lead to invoice to delivery.

- Lead: [tool/person] Proposal: [ ] Invoice: [ ] Intake: [ ]
- Delivery: [ ] Client approval: [ ] Support: [ ] Renewal: [ ]
- Reporting rhythm: [ ] Client channels and reply times: [ ]

8. Team and hiring

Who does what today, and when you hire.

- Today - sales: [ ] delivery: [ ] accounts: [ ] Contractors (role, rate, hours): [ ]

Role	Trigger (clients / revenue / hours)	Contractor or employee	Monthly cost

9. Tools and monthly software costs

Every job, the tool that does it, and its price.

Job	Tool	Plan	Monthly cost

10. Financial plan

Startup costs, monthly costs, 12 months of revenue, break-even.

- Startup costs (one-time): [list with amounts] Cash reserve: $[ ]
- Fixed monthly costs (incl. your pay): $[ ] Variable costs: delivery [ ]% of revenue, payment fees [ ]%
- Break-even clients = fixed monthly costs / (average retainer x (1 - delivery share - fee share)) = [ ]
- Cash low point: month [ ], $[ ] Years 2-3: clients [ ], average price $[ ], target margin [ ]%

Month	Clients	Revenue	Delivery	Fees	Fixed	Net	Cumulative

11. Risks and rules

What could hurt most, and the house rules that prevent it.

- Rules: max share of revenue from one client [ ]%; revisions [ ]; payment terms [ ]; out-of-scope work [ ]

Risk	Early sign	What we do

12. KPIs and milestones

Six to eight numbers you can check in minutes.

- Milestones - Month 1: [ ] Month 3: [ ] Month 6: [ ] Month 12: [ ]

KPI	Target	Where the number comes from	Review

Adapt it to your type of agency

The 12 sections stay the same for every agency. Use this table to adjust sections 3 (packages), 9 and 10 (costs) and 12 (KPIs) for your type of agency.

Agency type	Packages built from	Usual pricing	Main delivery cost	KPI to report
SEO	Pages, links and audits per month	Monthly retainer	Writers, link building, tools	Organic leads and rankings
Paid ads (PPC)	Platforms and ad spend managed	Monthly fee or % of ad spend	Specialist hours	Cost per lead, return on ad spend
Social media	Platforms, posts per week, short videos	Monthly retainer, ads separate	Content creators	Enquiries from social
Content	Articles or videos per month	Retainer or price per piece	Writers and editors	Traffic and leads from content
Web design	Pages, features, revision rounds	Project fee plus care plan	Developers	Launch date met, enquiries
Email marketing	Campaigns and automated flows per month	Monthly retainer	Copy and design	Revenue per email sent
Full-service	A mix of the above	Tiered retainers	Several contractors	Leads and revenue overall