

The background features abstract, overlapping green geometric shapes in various shades, creating a modern and professional aesthetic. The shapes are primarily triangles and polygons, some solid and some semi-transparent, arranged in a dynamic, non-symmetrical pattern.

Preparing Business Plan, Organizational Charts, Resumes of Key Personnel and Description of Large Jobs Completed

Dr. Jairo Borja, DBA

Agenda

- ▶ Business Plan
- ▶ Organizational Charts
- ▶ Resumes of Key Personnel
- ▶ Description of large jobs

Why have a Business Plan?

- Assess or *Re-assess* your business
- Describe goals & objectives
- Guideline to reach financial goals
- Be prepared for crises (i.e. COVID-19)
- Determine need for financing
- Help you explain your concept

What's in a Business Plan?

- ▶ Executive Summary
- ▶ Company Description
- ▶ Products/Services
- ▶ Marketing Plan
- ▶ Operations & Management Plan
- ▶ Financial Plan



Company Description

- ▶ Describe the business
- ▶ Legal structure
- ▶ Your products and services
- ▶ Identify target customer
- ▶ Business ownership
- ▶ Brief history if existing business (or acquisition)
- ▶ Location factors
- ▶ Hours of operation



Products & Services

- ▶ How product is produced
- ▶ Distribution description
- ▶ How service is performed
- ▶ Advantages/benefits
- ▶ Warranties/guarantees?
- ▶ Menus/Catalogs?
- ▶ Suppliers and Initial Purchase Levels



Marketing Plan

- ▶ How will you position your business
- ▶ Target Market
- ▶ How Product/service appeals to target
- ▶ Apply 4Ps to target (product, price, place, promotion)
- ▶ Marketing Budget



About the Market

- ▶ Industry profile & trends
- ▶ Market potential (your area demographics)
- ▶ Identify the characteristics & attributes of your target market/customer profile
 - ▶ Describe Customer Needs & Wants
 - ▶ Describe purchasing habits
- ▶ Analysis of Competitors
- ▶ Growth potential?

Doing the Research

▶ Secondary Research

- ▶ Trade publications, websites, etc
- ▶ NJ State Library System “Jersey Clicks” (Reference Solutions)

▶ Primary Research

- ▶ Networking clubs, groups in your business sector
- ▶ Local chambers of commerce and business associations

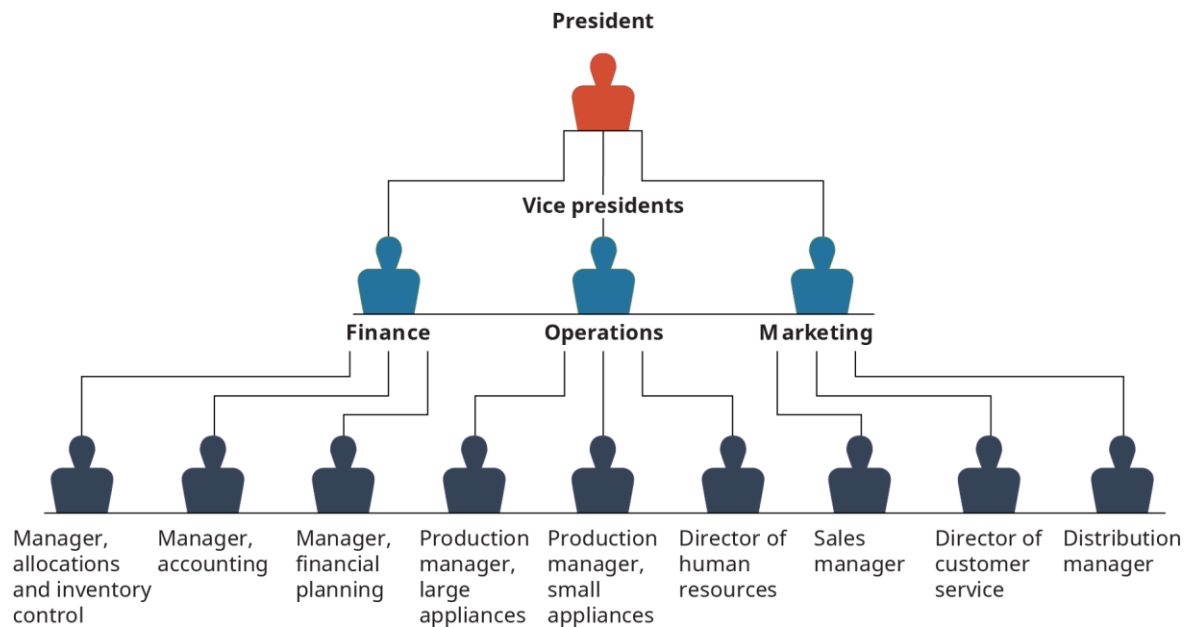
Operations & Management Plan

- ▶ Owner personal history
- ▶ Education/Credentials
- ▶ Related work experience
- ▶ Duties & responsibilities
- ▶ Owner compensation
- ▶ Other managers and employees
- ▶ Roles, responsibilities, compensation
- ▶ Job descriptions



Organizational Chart

- ▶ An organizational chart is a visual chart that represents the structure of a company. It highlights how teams and departments are organized, the reporting relationships across the organization, and every individual's role and responsibilities.



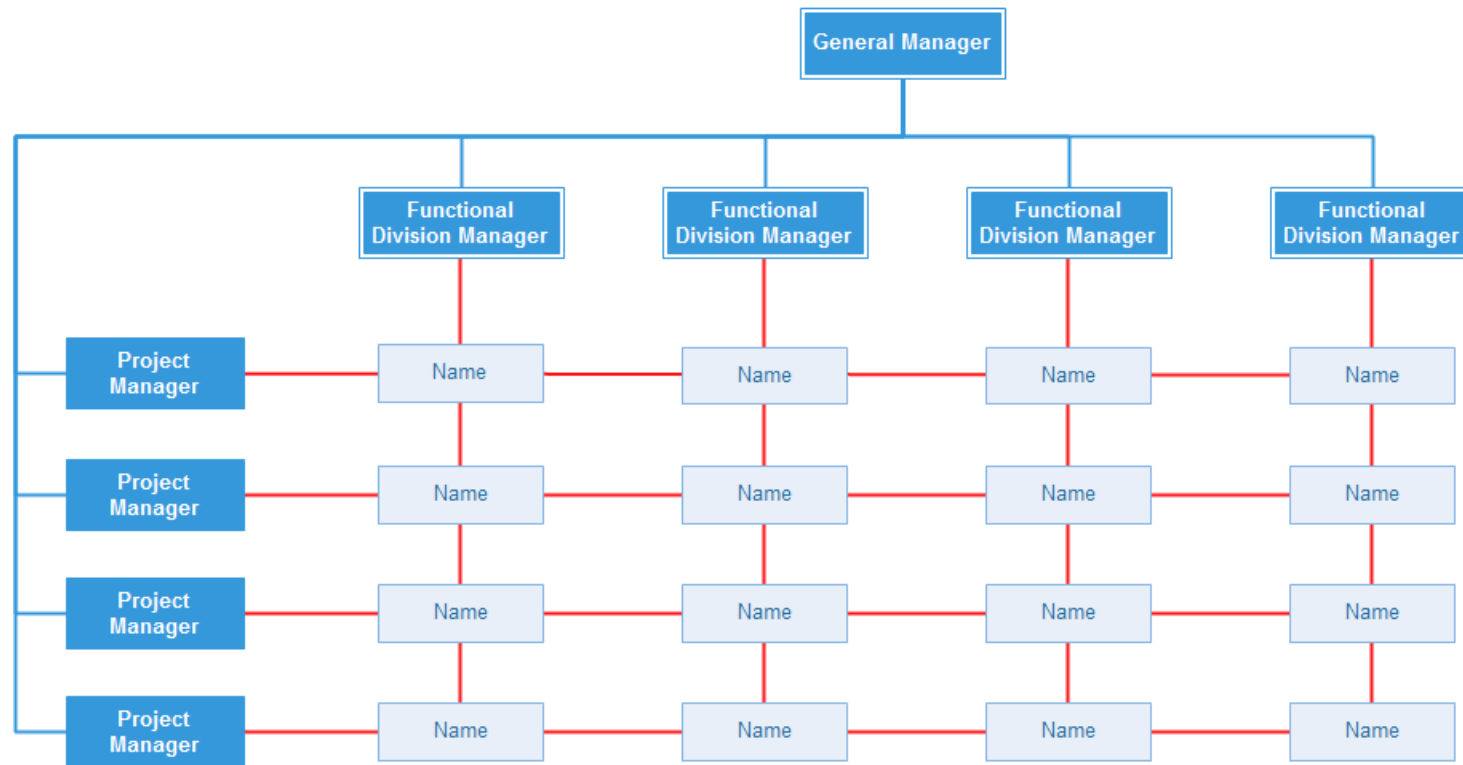
Types of Organizational Charts

- Vertical organizational chart (hierarchical organization chart)
- Horizontal organizational chart (flat organizational chart)
- Matrix organizational chart
- Creative organizational chart



Matrix Organizational Chart

Matrix Org Chart Template



Creative Organizational Chart

Diagram

CREATIVE ORGANIZATION CHART

This slide is perfect for product descriptions



Financial Documents

- ▶ Basic Financial Statements
 - ▶ Balance Sheet
 - ▶ Profit/Loss (Income Statement)
 - ▶ Cash Flow
- ▶ Sources/Uses of funds
- ▶ Capital Equipment Startup Costs
- ▶ Break even analysis



Resume of Key Personnel

- ▶ Four types of resumes
 - ▶ Chronological Resume
 - ▶ Functional Resume
 - ▶ Combination Resume
 - ▶ Targeted Resume

Chronological Resume

CYNTHIA MORGAN

PROFESSIONAL SUMMARY

Skilled and compassionate Human Resources Manager offering 12 years of progressive experience in human resources. Strategic leader, decision-maker, and problem solver. Communicates clearly and effectively while operating with a strong sense of urgency. Certified Professional Human Resources (IPMA-CP).

WORK HISTORY

HUMAN RESOURCES MANAGER | 06/2017 to Current
POWDR Corp. | Calumet City, IL

- Direct and control various benefit programs, including 401K, medical, dental, and vision packages.
- Monitor and handle all employee claims, including performance-based and harassment incidents.
- Streamline HR efficiencies, coordinated new hire orientations, and provide onboarding and training for 20+ new employees each year.

HUMAN RESOURCES ASSISTANT | 08/2013 to 06/2017
Literal | Calumet City, IL

- Delivered friendly assistance with new hires throughout interviewing and hiring process.
- Performed various administrative functions, including filing paperwork, sending mail, sorting mail, office cleaning, and bookkeeping.
- Assisted with the onboarding process of 100+ new hires in four years.

TECHNICAL RECRUITER | 02/2009 to 08/2013
The Trak Group | Calumet City, IL

- Used Boolean searches to develop applicant portfolios for expected openings.
- Sourced and selected over 50 applicants for technical positions within the company for each new job opening.
- Coordinated with IT team leaders to forecast hiring needs and department goals.

SKILLS

- Succession planning
- Payroll coordination
- Labor negotiations
- Compensation and benefits
- WorkForce Improvements
- Interpersonal skills
- Equal Opportunities Facilitation

Functional Resume

TANIA BLACK

Office Support | Customer Service Specialist

(000) 123-4567 | tblack@123email.co | [linkedin.com/in/tblack](https://www.linkedin.com/in/tblack) | Santa Clara, CA

SUMMARY

Energetic and engaging administrative specialist with experience in reception, customer service, meeting coordination, scheduling, and file management. Eager to blend exceptional organizational skills with diverse marketing, retail, and outreach experience in an office support role.

AREAS OF EXPERTISE

Reception & Customer Service

- Greeted and interacted with an average of 100 customers a day
- Responded to client questions efficiently and proactively resolved concerns, leading to a net promoter score of 52
- Answered up to 50 incoming calls a day and directed callers to the appropriate departments
- Managed the public email account and handled over 75 new messages daily
- Cultivated relationships with donors and potential supporters via phone and community events

Scheduling & Meeting Coordination

- Created complex weekly schedules for a team of 10
- Coordinated weekly team meetings, reserved meeting locations, and ordered refreshments
- Prepared PowerPoint slides and presentations for team meetings and fundraising events
- Assisted in planning quarterly fundraising events for up to 300 attendees
- Interfaced with vendors, booked venues, and arranged catering and entertainment

Administrative Support

- Organized and maintained 500+ donor files and assisted in the transition to a paperless filing system
- Monitored employee records, including promotions, discipline, and PTO
- Drafted content and announcements for a biweekly newsletter
- Supported social media presence and posted news and event details across the organization's handles

WORK EXPERIENCE

Outreach Volunteer | Community Education Fund | Mountain View, CA | 2016 – Present

Shift Supervisor | Cuppa Joe | Palo Alto, CA | 2013 – 2016

Marketing Intern | Banana Tree Designs | San Mateo, CA | Summer 2012

EDUCATION

Associate of Arts in Business Administration | College of San Mateo | June 2012

AWARDS & RECOGNITION

Fundraiser of the Year Award | Community Education Fund | 2017

TECHNICAL SKILLS

Microsoft Office Suite (Mac/PC), Salesforce, Instagram, Facebook, Twitter

Combination Resume

DUANE GONZALEZ

▪ Woodstock, GA 30188 ▪ (555) 555-5555, (555) 555-5555 ▪ example@example.com ▪

PROFESSIONAL SUMMARY

Tech-savvy Web Designer that specializes in creating online destinations precisely tailored to each customer's needs. Translates vague design goals into actionable, technical details—the trusted provider of sites and online assets designed to drive return patronage and increase engagement.

SKILLS

- Scripting languages
- Patience
- Attention to detail
- Analytics and metrics
- Web design templates
- Online marketing integration

WORK HISTORY

WEB DESIGNER 06/2020 to Current
Atlanta Web Design LLC, Woodstock, GA

- Determine coding requirements for site creation, including e-commerce capability, security, and specialized scripts.
- Translate customer requirements into technical site concepts for bidding and initial planning purposes.
- Perform over 20 technical presentations for internal colleagues and external stakeholders to illustrate proposed site designs each quarter.

WEB DESIGN ASSISTANT 09/2017 to 06/2020
MediaPressions Web Design, Crapabble, GA

- Multi-tasked across multiple functions and roles to generate project results and meet deadlines and organizational expectations.
- Provided 30+ websites using WordPress, Hubspot, and other editing software.
- Planned website development, converting mockups into usable web presence with HTML, JavaScript, AJAX, and JSON coding.

Targeted Resume

(TARGETED RESUME SAMPLE)

JANE J. SMITH

OBJECTIVE

To obtain a public staff accountant position

RELATED EXPERIENCE

Summer 2001 Olsten Financial Staffing Westchester, NY
Accounts Payable Analyst

- Compiled Expense Reports.
- Prepared Payroll Checks.
- Matched/Batched/Coded large corporate records.

Summer 2000 ACME, Inc. Fort Collins, CO
Assistant Bookkeeper

- Analyzed and prepared company ledger.
- Maintained trial balances.
- Utilized spreadsheet programs to log transactions for a mid-size company.

09/99-05/00 Nyack College Nyack, NY
Resident Assistant

- Liason between Resident Hall Director and residents.
- Coordinated floor activities and involvement for 40 residents.
- Assisted in selection and training of new residence hall staff.

EDUCATION

1998-2002 Nyack College Nyack, NY

- Bachelor of Science, Accounting.
- Minor: Business Administration.
- Overall GPA 3.3, Major GPA 3.5.

QUALIFICATIONS

Computer applications	Budget administration
Financial reporting	Client acquisition
Interpersonal relations	International market experience

Description of Large Jobs Completed

- Title and overview
- Purpose and Need
- Business Drivers
- Benefits and Costs
- Approach
- Timeline
- Requirements
- Outcome



Questions

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The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the slide, creating a modern, layered effect.

Thank You

Dr. Jairo Borja, DBA

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