

APPLICATION FOR PRACTISING CERTIFICATE

BUSINESS PROPOSAL

1. PERSONELL
 - 1.1 Background and relevant experience of applicant.
 - 1.2 Background and relevant experience of partners (if applicable).
 - 1.3 Consultants or specialist advisors.
 - 1.4 Profile of key staff including mid managers etc.

2. ORGANISATION:
 - 2.1 Organisation Chart (Year 1-3).
 - 2.2 Roles and responsibilities of key personnel.

3. SERVICES:
 - 3.1 List of services to be offered.
 - 3.2 Level of service to be provided.
 - 3.3 Detail of any specialist products or services to be provided.

4. CUSTOMERS:
 - 4.1 List types of customers with related fee income year 1.
 - 4.2 List of target customers year 2 and 3 and expected fees.

5. SALES AND MARKETING:
 - 5.1 List of captive clients.
 - 5.2 Strategy for winning new business. (Step-by-step action plan).
 - 5.3 Sources of new business (list contacts and target business for each).
 - 5.4 Sales and marketing budget.
 - 5.5 Point of differentiation – explanation of key selling points to win and hold business.
 - 5.6 Who will sell – roles for key personnel.
 - 5.7 Sales and marketing budget.

6. OPERATIONS:
 - 6.1 Location and premises.
 - 6.2 Technology.
 - 6.3 Staff recruitment policy.
 - 6.4 Staff contract terms and pay rates including overtime, paid leave etc.
 - 6.5 Training programmes to be implemented.

7. FINANCE:
 - 7.1 Source of finance.
 - 7.2 Evidence of loan approvals and availability of equity.
 - 7.3 Fallback arrangements.