

Project:

*<Team Name or Name of Design>*

*<Date>*

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# Introduction of Team

Information about each team members relevant background and long-term interests

## Program/Enterprise History

Based on sponsor's verbal presentation/Q&A, related documents and your research; provide the genesis of the program/project, founders, main stakeholders, and any traction to date.

## Anchor Purpose

What are the immovable values, business processes, assets, etc. that must be permanent to this enterprise or program?

## Beneficiary and Customer Problem(s)

Focus on primary beneficiary and customer(s), but mention secondary beneficiary and customer(s) if important to the story

# Beneficiary and Customer Description(s)

Describe segmentation demographics and relevant behavior profiles

# Long List of Initial Concepts & Criteria

List of ideas your team developed during brainstorm, including short description



## Concept Prioritization Criteria/Process

Explain the criteria/process you used to come up with your best concept?

## Primary Concept/Solution Detail

Explain your solution in detail (use two pages if necessary)

# Sales Channel Strategy

How will you sell your product/service(s)?

# Earned Income/Profit Model

What is the revenue model?

Generally describe the pricing.

Provide brief profit graphic.

# Differentiation/Competitive Assessment

Who are your main direct competitors?

Who are your main indirect competitors?

How will you “win” against competitors?

## Potential Size of Opportunity

What is the financial opportunity of this endeavor?

What is the impact opportunity of this endeavor? What are your primary impact measurements?

## Key Assets & Key Partners

What tangible assets does the Spice Kitchen already have?

Who are the current key partners?

What are the assets and partners they don't have that they need in order to be successful?

## Considerations & Conditions

What external factors are present that help your concept?

What external factors are present that you need to mitigate because they could create negative consequences to your concept?



# Growth Strategy(ies)

Where do you start in order to get traction with your product/service? A simplified “Go to Market Strategy” ...

Long-term how do you grow the program/enterprise?

# Thank You

Acknowledgement and appreciation to the project sponsors and anyone else that helped you with research/information and your idea

## **Appendix 1:**

*Optional; any additional slides that you think are interesting and relevant*

# Heading





Slide Text

**Appendix 2:**  
*Presentation Support (delete these for final presentation)*

# The SBP Canvas Description Snapshot

## Anchor Purpose

Initial overall company objective; why does it exist ? What do you want to achieve? (a mix of mission, vision and goals)

 <p><b>Beneficiary Problem</b></p> <p>What problem are you addressing for the beneficiary you are trying to help/support?</p>	 <p><b>Customer Problem</b></p> <p>What problem are you addressing regarding the revenue generating customers?</p>	 <p><b>Key Assets</b></p> <p>What are the key resources you need to start and grow your business?</p>	 <p><b>Key Partners</b></p> <p>What types of partnerships are necessary to start and grow your business?</p>
 <p><b>Solution</b></p> <p>What type of service or product are you offering to the customers? How do the beneficiaries benefit?</p>		 <p><b>Profit Model</b></p> <p>Describe your revenue streams? What are your main cost considerations? What type of margin is important for long-term sustainability?</p>	
 <p><b>Beneficiaries</b></p> <p>Describe the people , place(s) or things that you will support. What are their key behaviors and characteristics?</p>	 <p><b>Customer Segments</b></p> <p>Describe the customer segments you will appeal to. What are their key behaviors and characteristics?</p>	 <p><b>Differentiation</b></p> <p>How is your business design different from current competitive offerings?</p>	 <p><b>Considerations</b></p> <p>What are possible challenges? How do you mitigate those barriers/risks?</p>
 <p><b>Opportunity</b></p> <p>How big are the change and market opportunities?</p>		 <p><b>Growth Strategy</b></p> <p>How are you planning to grow this business?</p>	

# Social Blueprint Toolkit: Impact Business Plan Presentation Outline

The following 18 topics are recommended for comprehensive written and/or verbal presentations. Additional topics and reduction of the basic topics may be necessary for specific audiences. The order may depend on company stage, strengths and audience as well.

## Introduction

- Names and picture of presenters/main contacts
- Declarative statement regarding anchor objective

<SBP.C: Anchor Purpose, Contributors>

## Addressable Problem or Opportunity

- Summarize what problem or opportunity your company is addressing.
- For those businesses with a dual constituent model (separate beneficiary and customer), provide the primary problem for each.

<SBP.C: Beneficiary Problem, Customer Problem, Opportunity>

## Solution Overview

- Summarize what value your company provides to the customer and beneficiary.
- High level description of the product and/or service you provide.

<SBP.C: Solution>

## Market Analysis

- Define the industry you will be participating in.
- How big is the market?
- What are the drivers and trends relevant to your business.

<SBP.C: Opportunity, Considerations, Differentiation, Market Strategy>

## Traction

- Historical overview of how and when the team came together.
- Since inception, what progress has been made.

<SBP.C: N/A>

## Products/Services Detail

- Provide specific detail regarding your current or initial product/service.
- Include representative visuals of product/service.

<SBP.C: Solution, Differentiation>

## Profit Model

- How will your company derive revenue?
- What is your pricing strategy?
- What are the main cost drivers?

<SBP.C: Profit Model>

## Competitive Analysis

- Define the universe of companies and/or types of approaches that are similar in nature
- What attributes differentiates your approach or product/service from competitors?
- How do you protect your advantage?

<SBP.C: Differentiation, Opportunity, Customer Problem, Considerations>

## Customer Segmentation

- Based on a series of Use Cases, describe the demographic and behavioral characteristics of your current and potential customer segments.

<SBP.C: Customer Segments>

## Sales Strategy

- What is your current or initial sales channel approach? (Direct vs. Indirect Channels)

<SBP.C: Solution, Key Assets, Key Partners, Growth Strategy>

## Growth Strategy

- What are you prioritizing in the near term and in the future (product/service improvement, increasing current customer base, expansion to new customers or regions, expansion of product/service(s), etc).
- What are the main steps?

<SBP.C: Growth Strategy, Solution, Considerations>

## Team

- Provide background information regarding the founders, the management team and or other significant team members.
- Identify each team members current title and role.

<SBP.C: Contributors>

## Influencers

- Provide background information regarding formal/informal advisors, investors & strategic partners.

<SBP.C: Contributors, Key Partners, Differentiation, Considerations>

## Impact Goals

- Describe your beneficiaries.
- How will you measure your social or environmental impact?
- What are the expected outcomes in the future?

<SBP.C: Beneficiary Problem, Beneficiaries, Opportunity>

## Financial Summary

- P&L History and 3-5 Year Pro Forma
- Include Gross and Net Margins
- Cash Flow with Burn Rate

<SBP.C: Profit Model>

## Investment Summary

- Previous financing rounds
- Amount of financing being sought
- Anticipated future financing needs

<SBP.C: N/A>

## Operations Priorities

- Describe your main operational needs or activities. These should clarify the role of new financing.

<SBP.C: Considerations, Growth Strategy>

## Business Overview

- Last slide before appendix, that recaps the company and deal.

<SBP.C: Anchor Purpose, Problem(s), Solution, Opportunity, Differentiation>

# Impact

## Strategy Advisors

Strategy | People Capital | Investments

Increasingly, businesses are addressing their stakeholders interest in aligning purpose with their investments, brands, neighborhoods and workers. Our firm was developed to support operators, policy makers, academics, foundations and capital providers in this market evolution towards a “Purpose Economy.”

Impact Strategy Advisors (ISA) is a San Francisco based impact management and investment consulting firm. As the premier US advisor for the purpose economy, we exclusively partner with clients whose organization blends strong commercial fundamentals with authentic social and/or environmental values.

Through our three integrated professional services; **strategy analytics, executive recruiting and investment management**, we provide our clients with the breadth of tools and the depth of knowledge needed to solve their most critical needs. We view each of our clients as partners and continually invest time in understanding their people, processes and expectations. We believe this helps our engagements be appropriately customized, which leads to the best possible outcomes.

### Driven By Our Values

#### Discover

Listen, reflect and share

#### Empathize

Consider others

#### Empower

Invest in people

#### Excel

Be accountable

#### Innovate

Create with passion

Our talented staff have expertise in a variety of impact theme areas including; education, youth development, economic development, entrepreneurship, diversity, job creation, poverty alleviation, technology for change and the field of impact investing.

While our client engagement objectives are varied, examples include; analyzing lines of business for large social enterprises, designing earned income programs for large social non-profits, developing impact investment strategies for family offices, sub-advising for established funds, hiring investment executives for impact funds and their portfolio companies, advising on new economic development public policy, creating opportunity landscapes for investors, developing knowledge primers for wealth management groups and their clients, and doing diligence of investors or grantors.