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# *¿CÓMO REDACTAR el BUSINESS PLAN?*

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*Horizonte 2020*





## PROYECTOS DE I+D+I

Identificación, concepción, redacción, presentación y gestión de proyectos de I+D+i. Ámbito nacional y/o europeo (Horizonte 2020). Ayudamos a definir el **IMPACTO** de los proyectos



## TRANSFERENCIA Y COMERCIALIZACIÓN TECNOLÓGICA

Desarrollamos un amplio catálogo de servicios para ayudar a nuestros clientes a transferir y comercializar su tecnología a nivel internacional.



## ESTRATEGIA DE MERCADO EN TECNOLOGÍA E INNOVACIÓN

Nuestro equipo incrementa la posibilidad de desarrollo de negocio para nuestros clientes, reforzando sus capacidades y favoreciendo su presencia en el **MERCADO**



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## ***Estrategia de innovación***



Es un **instrumento** que asegura que se consiguen los resultados en términos de impacto. Debe responder a estas 3 cuestiones clave:

- ➔ ¿Qué **problema o demanda** satisface la innovación?. P.e. Lucha contra una enfermedad determinada.
- ➔ ¿Qué se pretende **exactamente conseguir**?. P.e. Nuevo producto con las siguientes características: a) Efectividad médica; b) Resultados comerciales
- ➔ ¿Cómo llega esa innovación al **mercado**?. P.e. Crear una nueva compañía, vender la IP, Promoción y marketing de producto, etc.

## 3. Business Plan

## 2. Producto/servicio

### Propuesta de Valor

**2.1 Problem statement:** In this section, you should provide a description of the problem that the proposed venture is trying to address. Moreover, you should explain in a clear manner how this problem translates into a promising business opportunity by identifying a specific social challenge to be tackled and/or a market gap to be filled such as a latent or unsatisfied demand.

**2.2 Solution:** This section should present, in detail, the solution that will be marketed in order to solve the problem that you described in the previous section. The description of the solution should include technology characteristics and innovative features as well as any complementary services that you plan on offering. In the case that the business plan is targeting investors that might not be entirely familiar with technical terms, the language used for describing the solution should be simplified (to the degree possible).

**2.3 Value proposition:** The value proposition is the formulation of your innovative offering in a way that it values the benefits for your customer(s). This part of the plan should also include an explanation of how your innovation is different from the competition focusing on its competitive advantages and unique selling points as well as explaining how they create value for the customer(s).

**2.4 Technological environment:** Here, you should elaborate on the position of the innovation in a technological framework. Simple explanations should be prepared and included for any specialised terminology and concepts. **Indicative questions:** *What is the “state of the art” in the field? How is the solution positioned in relation to what already exists in the market and how should it evolve in the future in order to remain competitive at a technological level?*

**2.5 Research & development:** This section should reflect the current status of your R&D project including details with respect to the time and budget required for completion and market launch. **Indicative questions:** *What is the current status of R&D? What additional R&D work is required? How is this work organised? Will there be any external partners required (e.g. research and technology organisations, living labs, etc.)? What are the risks associated with R&D and what measures are foreseen to minimise them?*

**2.6 Intellectual property rights:** The strategy regarding protection of Intellectual Property Rights (IPR) should be the focal point of this section. Details should include any patents that the R&D project team holds or has applied for as well as any trademarks or other rights which are currently owned or will be sought in the future. **Indicative questions:** *Does the R&D team hold any patent(s)? What are the geographical limitations? Who holds the patent(s)? What are the budgetary requirements for effective IP protection?*

**2.7 Standards and regulation:** This section should summarise any legal standards or regulations that may affect the development and commercialisation of your innovation. For instance, you may want to create a table comprising the principal standards pertaining to your innovation and its application and describing any possible implications. **Indicative questions:** *Which elements of the innovation are standardised or regulated by relevant legislation? What are their implications for R&D and marketing?*



## 3. Business Plan

### 3. Mercado/competidores

#### Propuesta de Valor

**3.1 Description of the market:** A general description of the market that your innovation is targeting should be provided here along with its anticipated future development and main growth drivers. **Indicative questions:** *What are the size and key features of the market under consideration? Which segments exist and what dynamics do they exhibit? What is the estimated potential for growth?*

**3.2 Customers:** In this section, potential customer groups for your innovation should be identified and described. **Indicative questions:** *Which homogeneous groups of customers can be identified for the innovation? What are the common, identifiable characteristics of these customer groups?*

**3.3 Market structure:** Here, you should elaborate on the relationships that exist between the various actors in your market (e.g. customers, suppliers, etc.) and on factors that may influence purchase behaviour. **Indicative questions:** *How does the market work? Who are the main actors in each customer group? Which is the typical purchasing process: who is involved and what are the key criteria for each one (price, quality, etc.)? Is the end-user also the decision-maker and/or the payer? What are the implications?*

**3.4 Competition:** This section should provide an assessment of the competition operating in the target market. **Indicative questions:** *How are the needs of target customers satisfied now? Are there any major competitors who already market the same (or quite similar) technology/product/service? What are their market shares, competitive advantages, growth rate and/or any recent developments, etc.?*

## 3. Business Plan

## 4. Estrategia de marketing

### Propuesta de Valor

**4.1 Product:** The exact product offering should be defined here. **Indicative Questions:** *Are we selling a product, a service, or a full solution? Do we have different offerings for different segments? Are there any bundling possibilities?*

**4.2 Segmentation and targeting:** In this section, potential customers should be grouped in homogenous segments, each of which should be described in terms of economical size, needs and requirements, trends, etc. with a view to targeting the most appealing one(s). **Indicative questions:** *What criteria can be used to divide prospective customers into homogeneous segments (e.g. geographic, customer size, etc.)? Which segments are the most appealing and why?*

**4.3 Positioning:** This section should describe the desired market position of the innovation as well as outline your planned strategy to achieve it. You should prepare a positioning statement that will clearly communicate (internally and/or externally) the position that your solution is aiming to occupy within the mind of your targeted customer(s). **Indicative questions:** *How will we differentiate our offer from the competition and how are we going to achieve this (e.g. unique selling points, reputation, branding, etc.)?*

**4.4 Sales and distribution strategy:** This section should define your sales objectives and lay out the strategy to reach them. The methods that will be employed to realise sales should be included here as well (e.g. own sales force, distributors, local sales representatives, etc.). **Indicative questions:** *What are the sales targets and chosen channels of distribution (e.g. by customer segment)? Are there any special services (e.g. after sale support, credit, etc.) that will be provided for customers and/or intermediaries? Can we use the same channels for different segments, or should we diversify?*

**4.5 Price:** Here, you should define and justify the pricing of your innovative solution. **Indicative questions:** *What is the price that target customers have to pay at the moment to satisfy their need for our innovation? What are the price trends that are currently dominating in the market? Based on these, what pricing policy should we adopt per target segment?*

**4.6 Promotion:** The strategy and actions to be implemented in order to widely increase awareness on the innovation and establish (initial) contacts with prospective customers will be presented here. **Indicative questions:** *What message should we communicate? What marketing and communication tools will be used (by customer segment)? What promotional activities are planned (e.g. internet presence, advertising campaign(s), trade fairs, etc.)? What monitoring mechanisms are in place? Should there be variations across target segments?*

## 3. Business Plan

5. Gestión	6. Estructura de compañía	7. Factores de riesgo
Definición del equipo de gestión para demostrar que posee la experiencia necesaria para el éxito comercial.	Definir la estructura de la empresa que introducirá la innovación en el mercado.	Identificar cualquier riesgo potencial (p.e. Operacional, legal. Regulatorio, etc) así como otros factores (p.e. Desarrollos de mercado o tecnológicos) que pueden influenciar el éxito de la comercialización

## 9. Financiación Propuesta de Valor

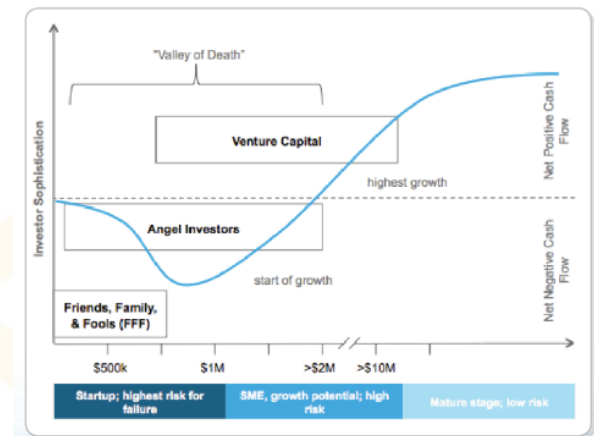
**9.1 Assumptions:** This section should describe in a comprehensive summary, all the assumptions that you made in order to develop the financial forecasts of the business plan.

**9.2 Financial analysis results:** Here you will demonstrate the financial viability and robustness of the proposed venture by presenting the results of all the financial analyses that were running including: financial forecasts, pro forma profit and loss statement and balance sheets, break-even analysis, cash flow statements, etc. Indicative templates you can use for this section are annexed to this guidebook.

**9.3 Capital requirements:** The capital requirements of the venture within the time frame of the business plan should be explained here. **Indicative questions:** *How many steps of financing are necessary? For what period is the financing required?*

**9.4 How funds will be used:** In this section, you should describe in detail how the funds that will be obtained by external investors are going to be used / invested. **Indicative questions:** *Is the amount of capital requested going to be used for e.g. R&D, capital equipment, marketing, general working capital, etc.?*

**9.5 Exit / payback strategy:** This section should explain how and when your prospective investors are going to “cash out” their investment. The projections should indicate that the invested funds will enable you to generate the revenue required for payback and exit of your investors.



Source: engage AG illustration following Volkmann, Tokarski & Grünhagen (2010) and Smith & Smith (2004)





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**Gracias**

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