

BUILD AND DOWNLOAD YOUR BUSINESS PLAN

You want a business plan a bank or a funder will read. It is free.

BEFORE YOU START

HAVE THESE READY (ABOUT 45 MINUTES)

- ✓ Your five questions answered.
- ✓ Roughly what you sell, and what it costs you.
- ✓ Your numbers, if you are trading.

STEP BY STEP

9 STEPS

Step 1 of 9 **Screen: Business plan**

How to get there: Tap Services, then Business plan.

What you see: What the plan gives you, and "Free to start and to download".

Tap: Start now

What happens next: The business plan builder opens.

If something goes wrong: Not signed in? It asks you to register first: see guide E1.

Step 2 of 9

Screen: Improve your business plan by updating the red tabs below:

How to get there: Your home screen, the My business plan tile.

What you see: The black status strip, then tabs: red ones still need you.

Tap: a red tab

What happens next: That section opens.

If something goes wrong: If it still does not work, tap "WhatsApp us" at the bottom of the guide and tell us what you see.

Step 3 of 9

Screen: Improve your business plan by updating the red tabs below:

How to get there: The same page.

What you see: A link "choose who your customers are".

Tap: choose who your customers are

Type: Who buys from you, for example "people in Seshego".

What happens next: Your market section fills in.

If something goes wrong: If it still does not work, tap "WhatsApp us" at the bottom of the guide and tell us what you see.

Step 4 of 9

Screen: Improve your business plan by updating the red tabs below:

How to get there: The same page.

What you see: "Fill in Dates".

Tap: Fill in Dates

Type: The month your plan starts, for example March 2026.

What happens next: Your projections start from that month.

If something goes wrong: If it still does not work, tap "WhatsApp us" at the bottom of the guide and tell us what you see.

Step 5 of 9

Screen: Your opening balances

How to get there: Only if you are already trading: from the plan's money section.

What you see: Boxes for cash, debtors, stock, equipment, creditors and your owner loan.

Tap: Save my opening balances

Type: Cash in the bank on the start day, for example 12000.

What happens next: Your plan starts from these balances, not from zero.

If something goes wrong: "First tell us the date your plan starts": do Fill in Dates first.

Step 6 of 9

Screen: Your business logo

How to get there: "Add your logo to the cover" on the builder.

What you see: A box to choose a picture.

Tap: Save my logo

Type: A photo or picture of your logo from your phone.

What happens next: Your logo is on the plan's cover.

If something goes wrong: Picture too big? Use a smaller photo.

Step 7 of 9 Screen: Your business plan

How to get there: "Download your business plan" on the builder.

What you see: One button.

Tap: Make my business plan

What happens next: The plan is built in the background. You can leave the page.

If something goes wrong: If it still does not work, tap "WhatsApp us" at the bottom of the guide and tell us what you see.

Step 8 of 9 Screen: Your business plan

How to get there: Come back to the same page, or open the email.

What you see: "Your plan is ready" and a download.

Tap: Download

What happens next: The PDF saves to your phone.

If something goes wrong: Taking long? It is still working; we email you when it is ready.

Step 9 of 9 Screen: My Progress

How to get there: Your home screen, then My Progress.

What you see: Your plan is ticked done, and the next step is your readiness score.

Tap: Get your readiness score

What happens next: Market readiness opens: see guide E5.

If something goes wrong: If it still does not work, tap "WhatsApp us" at the bottom of the guide and tell us what you see.

WORDS EXPLAINED

Projections

What the business should earn and spend, month by month.

Opening balances

What the business had and owed on the day your plan starts.

Project

The piece of work a tool helps you finish, with a start and an end date.