VIRTUAL CEO *Life*

PILLAR 02 OF THE VCEO METHOD · BUILD

The Business Plan Journey

Nine stages from idea to a business model you can explain in one paragraph, built on the Business Model Canvas.



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virtualceolife.com

VANTECH

A NOTE FROM JOE

Why this journey

Creating a business plan is an incredible journey. It turns an idea into a cohesive business model, and it works best after you've written your Life Plan, so the company you design serves the life you want.

I first built this workbook for founders I was coaching in 2016, and I've used it ever since. As a fellow entrepreneur, I know the challenges you'll face. This journey gives you the structure, strategy, objectives and financial model that improve your chances of success.

I ask for one thing: your 100% commitment. Building a company takes everything you have. What you give this plan is what you give back to yourself, your future clients, your team and your community.



How to use it

- **One stage at a time.** Each stage takes one or two focused sessions.
- **Write long, then cut.** Clarity shows up as fewer words.
- **Use real data.** Support market answers with links and sources you can check.
- **Fill the numbers.** Stage 6 has the formulas; a spreadsheet makes them easier to update.
- **Graduate.** If you can summarize the whole business in one paragraph at the end, you're done.



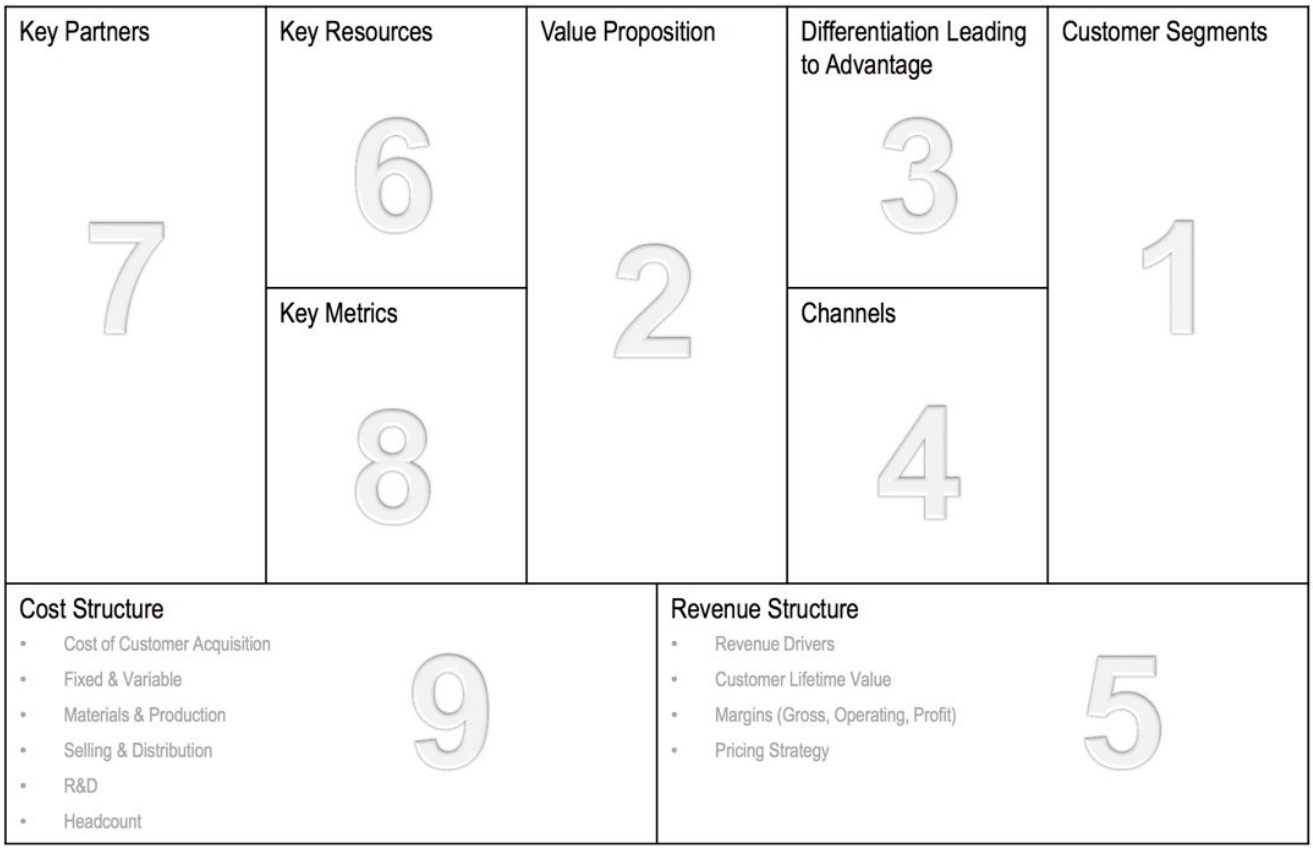
THE BUSINESS PLAN JOURNEY

The Business Model Canvas

Nine blocks. One business you can explain.

The nine stages

01	Foundation: mission, vision, company and milestones
02	Customers: market size, segments and buyer personas
03	Value proposition and differentiation
04	Competition
05	Go-to-market: products, channels, sales and marketing
06	The numbers: revenue, costs, unit economics and breakeven
07	Execution: resources, partners, technology and team
08	Risks, legal and funding
09	Objectives, milestones and the one-paragraph summary



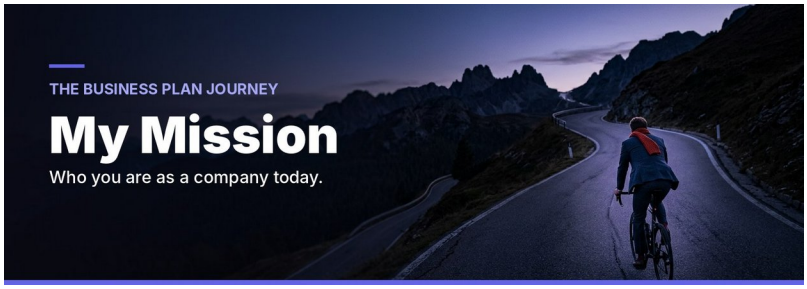
The Business Model Canvas: every stage of this journey fills one or more of its nine blocks.



STAGE 01 OF 9

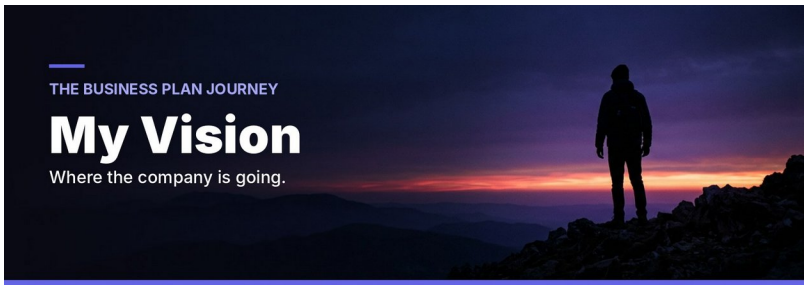
Foundation

Who you are as a company today, where you're going, and what got you here.



Mission: the present moment

Summarize your objectives and philosophy in one cohesive paragraph: the nature of the business, its principles, financial goals, culture and how you want to be seen in the market. Start with a few paragraphs and narrow it to one.



Vision: the future

If the mission is the present, the vision is where you will be. One paragraph. Is it in line with the mission?

Your company in one or two paragraphs

Milestones to date

What success, experience or moment drove you to create this company? Why will it succeed? What are you GIVING your market?



STAGE 02 OF 9

Customers

For whom are you creating value? Who buys, how big is the market, and how do they buy?



Market size

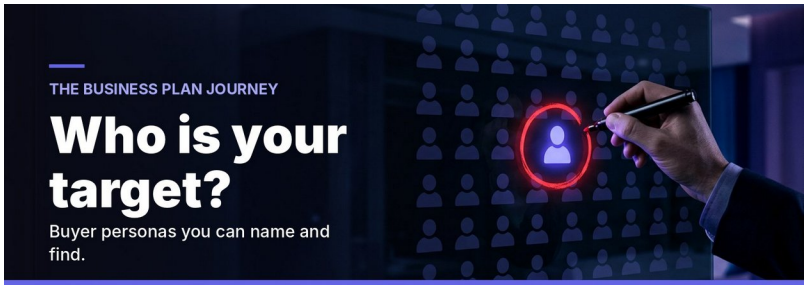
Total addressable market (TAM) *Everyone who could buy this type of product.*	
Serviceable market (SAM) *The part you can actually reach with your model.*	
Obtainable market (SOM) *Your niche: what you can realistically win in 2–3 years.*	
Sources *Links to the data you used.*	

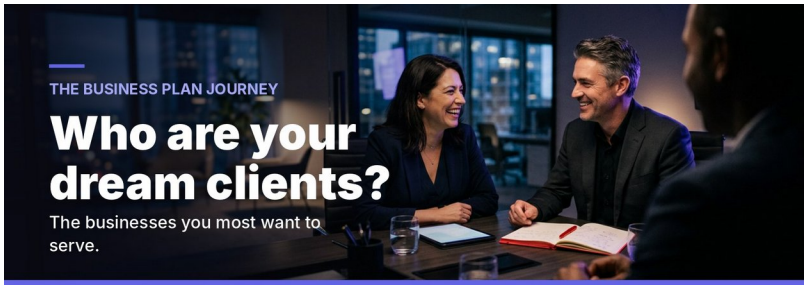


Segments

One row per type of buyer.

Segment	Their need	Where and how they buy	How they pay	Profitability





Dream clients

Name three types of businesses you dream of working with, and the markets (geography) you'll cover.

Buyer persona 1

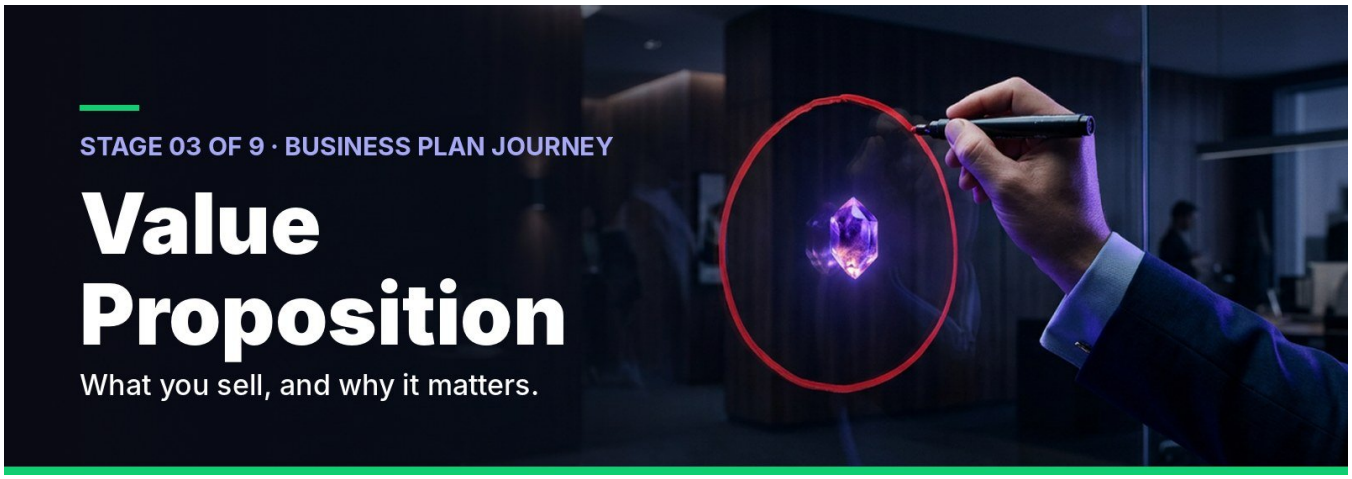
Name of the profile	
Who they are *Role, company size, industry, location*	
What they do *A normal week*	
Pains and goals	
Where they get information *Channels, events, people they trust*	
What makes them buy	

Buyer persona 2

Name of the profile	
Who they are *Role, company size, industry, location*	
What they do *A normal week*	
Pains and goals	
Where they get information *Channels, events, people they trust*	
What makes them buy	

Buyer persona 3

Name of the profile	
Who they are *Role, company size, industry, location*	
What they do *A normal week*	
Pains and goals	
Where they get information *Channels, events, people they trust*	
What makes them buy	

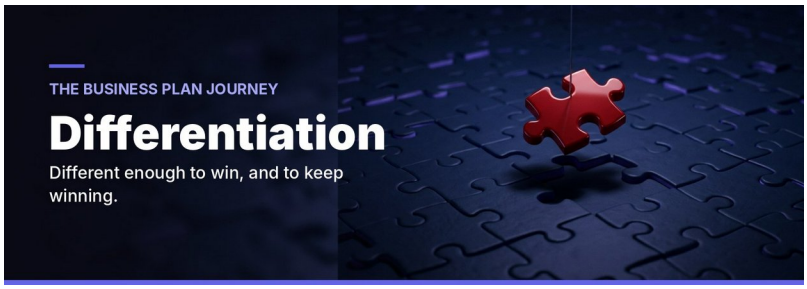


STAGE 03 OF 9

Value proposition and differentiation

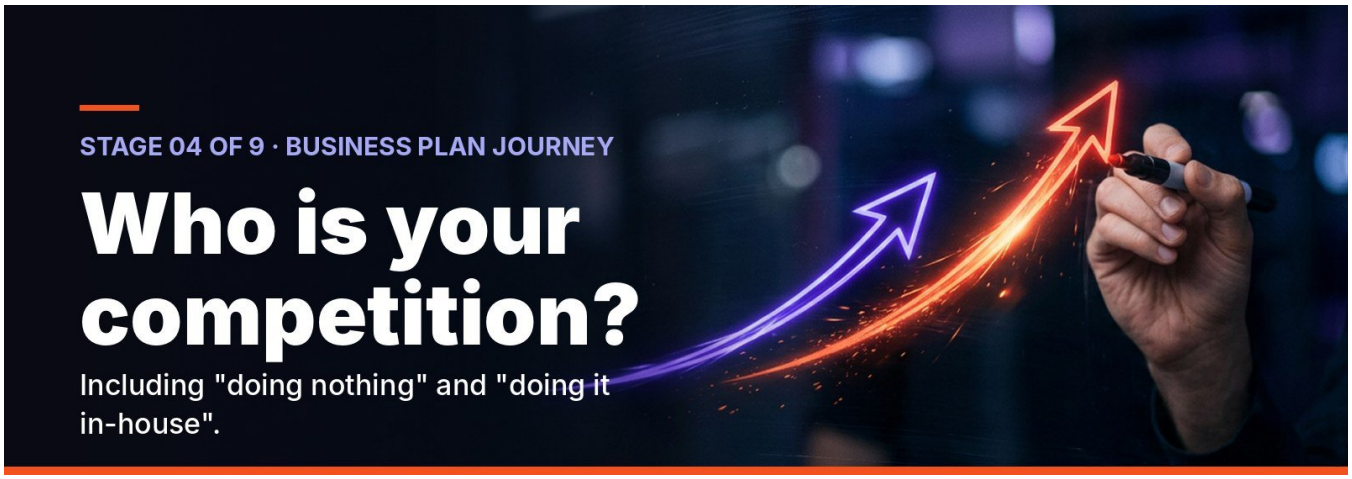
What you sell, why it has value, and what makes it different enough to win.

What is it?	
Who is it for?	
Why do they need it? *How important is the problem you solve?*	
How does it work?	
What is unique?	
Which attributes resonate most with your customer?	
Is the advantage durable? Why?	
Proof *Can you substantiate the value with numbers or stories?*	



Your value proposition in one sentence

For [customer] who [need], [company] is the [category] that [benefit]. Unlike [alternative], we [difference].



STAGE 04 OF 9 · BUSINESS PLAN JOURNEY

Who is your competition?

Including "doing nothing" and "doing it in-house".

STAGE 04 OF 9

Competition

To win, first understand who you're up against, including "doing nothing" and "doing it in-house."

Competitor	What they sell	Price	Strengths	Weaknesses	How we're better

Industry and trends

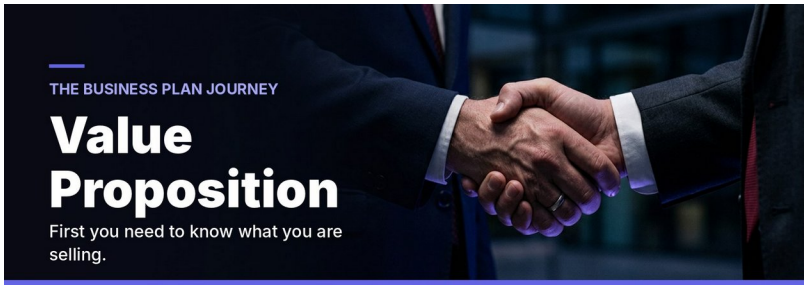
Maturity *New industry or established?*	
Key success factors *What do you need to succeed?*	
Regulation *Is the market regulated?*	
Trends *What is changing, including AI and remote work?*	



STAGE 05 OF 9

Go-to-market

How you package your offer, reach each segment and turn interest into revenue.



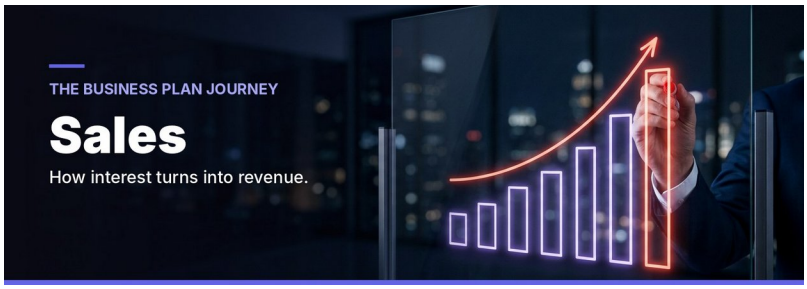
Products and services

List every product or service for your target clients. Example: a free diagnostic, a core service, a premium tier, workshops.

Channels

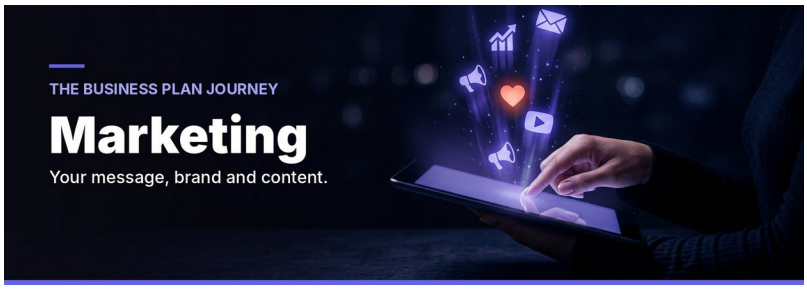
Social media, events, website, partners, resellers, outbound.

Channel	Segment it reaches	Direct or partner?	Cost	Works today?



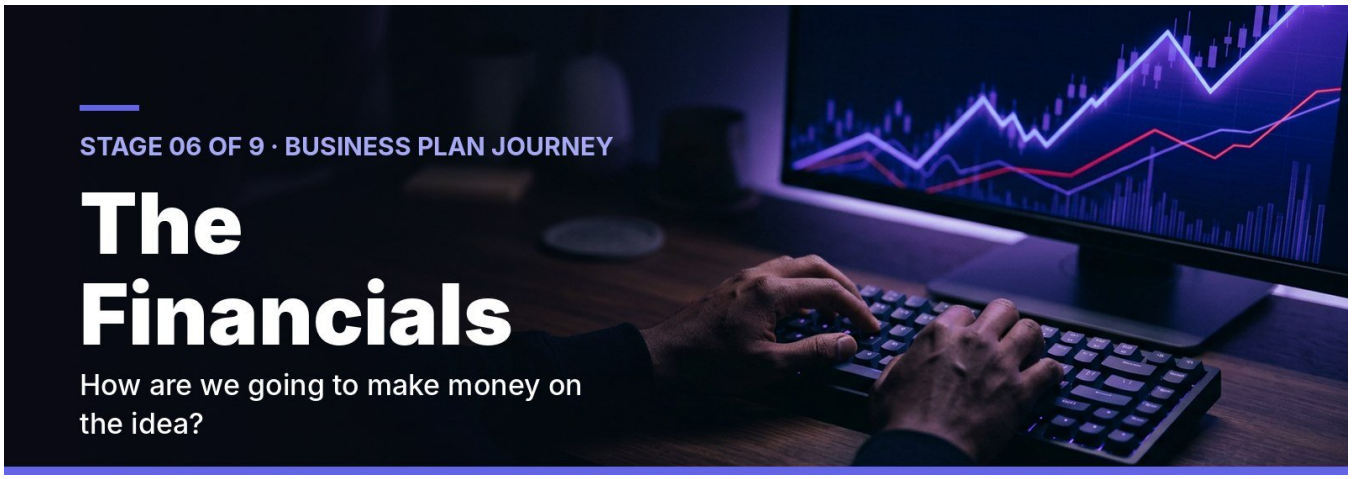
Sales strategy

How you sell *Inbound, outbound, partners, self-serve*	
Sales team and structure	
Sales cycle *Average time to close; one-time or recurring?*	
Sales objectives *Next 6 and 12 months*	



Marketing

Your message *What should every piece of marketing say?*	
Brand and content *Social, blog, video, newsletter*	
Press and conferences	
Free offer *What can prospects try before they buy?*	



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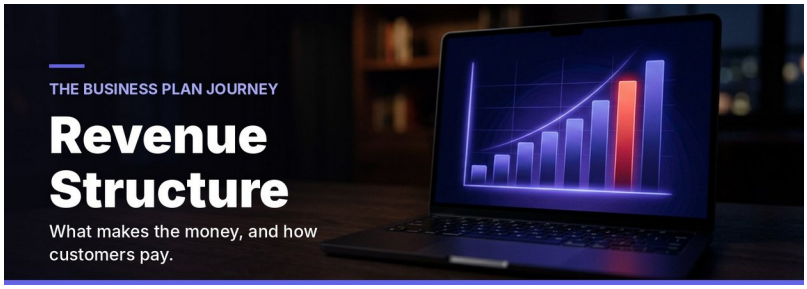
The numbers

How the company makes money, what it truly costs to run, and when it breaks even.



Revenue

Revenue drivers *What makes the money?*	
Pricing *How you price, and what customers are willing to pay*	
Payment *How and when they pay*	

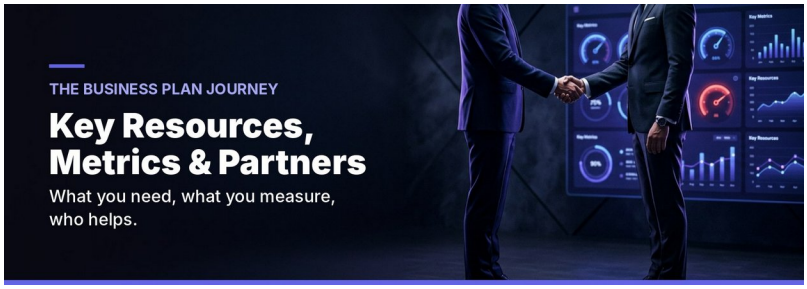


Costs

Cost item	Fixed or variable	Monthly amount	Notes

Unit economics

Metric	Formula	Your number
Contribution margin	Price per unit − variable cost per unit	
Customer acquisition cost (CAC)	Sales + marketing spend ÷ new customers	
Customer lifetime value (CLTV)	Average monthly margin per customer × months they stay	
CLTV : CAC	CLTV ÷ CAC (aim well above 1)	
Breakeven (units)	Fixed costs ÷ contribution margin per unit	
Breakeven (sales)	Breakeven units × price	



Key metrics

Which five numbers tell you, every week, whether the model works? Who owns each one?

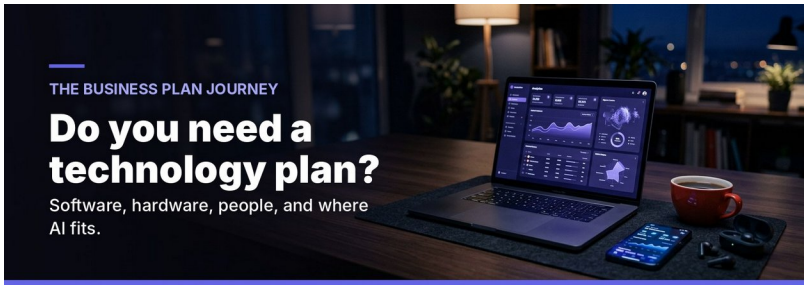
Metric	Definition	Target	Owner



STAGE 07 OF 9

Execution

What you need to deliver the value proposition, and who will do it.



Key resources *Human, financial, physical, intellectual*	
Rent, lease or borrow? *What doesn't need to be bought?*	
Operations *How you'll deliver to clients; capacity*	
Technology plan *Software, hardware, internet, people; where AI fits*	

Key partners

Partner	Value they deliver	How critical?	Risk they reduce



Team

Who are your key people? Which roles can be remote?

Name	Position	Role in the company	In-house or remote



Admin Emily

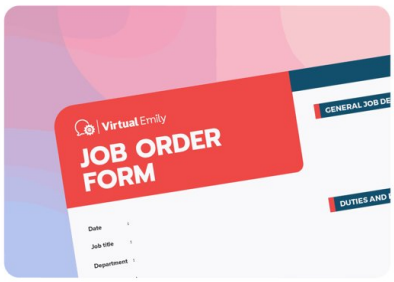


Customer Experience Emily

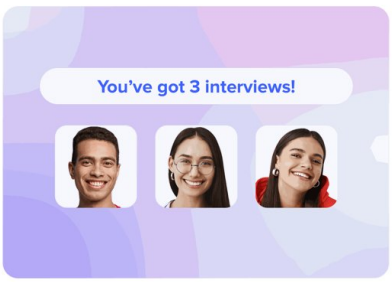


Data Emily

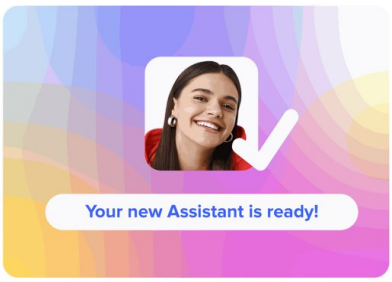
Which roles can be remote? Admin, customer experience and data are the first three most founders delegate to a bilingual remote executive.



1 · Send your job order

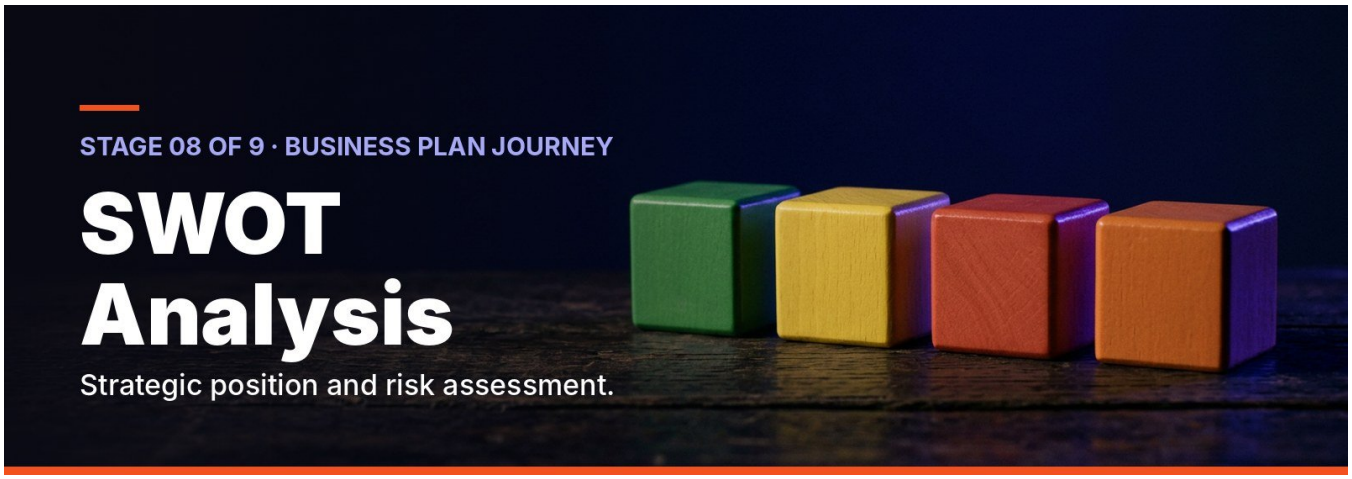


2 · Interview 3 Emilys



3 · Your Emily is ready

Adding a remote team member: send the job order, interview three candidates, start.



STAGE 08 OF 9

Risks, legal and funding

What could go wrong, how the company is set up, and how you'll finance the plan.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS



Legal

Legal risks of the operation	
How the company is constituted *Entity type and where*	
Partners *Who, their roles and percentages*	

Funding

Do you want investors? *Or bootstrap, debt, grants?*	
How much, and for what?	
What is each percentage point worth?	



STAGE 09 OF 9

Objectives and the one-paragraph summary

What you want the company to achieve, the milestones to get there, and the whole plan in one paragraph.

Objectives

One page. A bullet per objective, a sentence or two each. How will each one serve your customers?

Two-year plan, in six-month steps

Period	Milestone	Key metric	Owner



Executive summary

Summarize the entire business in one paragraph. If you can, you have graduated from this journey.

WHAT COMES NEXT

A plan is a start. A system is what runs it.

The Business Plan Journey sits inside Pillar 02 of the VCEO Method. Pair it with your Life Plan, then install the operation that makes it repeatable: documented processes, live KPIs and a trained remote team.

Your first hour with Joe is the diagnostic itself.

The EMOP Diagnostic: sixty minutes, free, scored live across seven areas. You keep the scorecard template either way.

Book it at joethevceo.com →

Start with the Life Plan, Pillar 01: virtualceolife.com

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