

**Operations Plan Preparation Form**

*On this form record specific information relating to your company's operational processes.*

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Key Aspects of Operations (possibilities include facilities, production process, equipment, labor force utilization): \_\_\_\_\_

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Cost and Time Efficiencies: \_\_\_\_\_

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Competitive Advantages: \_\_\_\_\_

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Problems Addressed and Overcome: \_\_\_\_\_

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*Use this information as the basis of your plan's Operations section.*

**SAMPLE PLAN: OPERATIONS****OPERATIONS**

A key element of ComputerEase's operations is its Corporate Training Center, located at 987 South Main Street in Vespucci. The Center currently consists of 20 student computer stations, equipped with all the major business software programs, an instructor's computer station and projection equipment, and state-of-the-art technology enabling the instructor to monitor exactly what each student is doing.

The Corporate Training Center is vital because most of ComputerEase's corporate customers have limited, if any, extra computer facilities on their premises appropriate for conducting on-site corporate classes. Thus, ComputerEase can only grow its in-person training courses to an adequate level of income by having well-equipped training facilities of its own to offer.

For its online training courses, ComputerEase decided not to buy and manage its own servers and build its own data center, but to outsource that to a managed hosting vendor who provides a turnkey solution for all hardware/software needs and maintenance, backups, and upgrades.

**Corporate Training Centers**

On August 1, 2014, ComputerEase opened its first Corporate Training Center, along with its company's headquarters. This Training Center is equipped with 20 personal computer stations. Prior to the opening of the Training Center, ComputerEase was limited to conducting training programs at the clients' place of business (referred to as on-site programs).

**Cost- and Time-Effective Programs**

These on-site programs produce lower profit margins than Training Center classes or online classes. Generally, fewer students attend each on-site training session; instructors spend additional time for travel and setup, and costs arise from the transportation of equipment and materials and subsequent wear and tear. While ComputerEase charges higher fees per student in these on-site classes, the market will not bear prices that truly absorb the increased costs.

Moreover, the potential customer base for Training Center classes is substantially larger than that for on-site programs. More businesses can afford to send employees to scheduled classes at ComputerEase's Corporate Training Center—or have a class developed for them at the Center—than can incur the costs and disruption of an on-site program. Online programs offer even greater flexibility.

With the funds now being sought, the company will open a second Corporate Training Center in the city of Whitten Park, where many of its corporate customers are located.

**Competitive Advantages**

In addition to an offshore technical support center, ComputerEase outsources its data center operations. These centers created several key advantages for ComputerEase. First, these strategic operations decisions allow ComputerEase to focus on what it does



*Describes a key aspect of operations.*

*Shows method of increasing profitability.*

**SAMPLE PLAN: OPERATIONS (continued)**

*Indicates how excess capacity is used profitably.*

best—design classes to efficiently and effectively teach computer software—rather than worry about the nuts and bolts of the underlying supporting technology. ComputerEase doesn't have to worry about finding and retaining qualified technical staff, or expend large capital investments in hardware and software. Instead, it pays predictable monthly wages and fees to its offshore team and outsourcer respectively, which it can write off on its taxes as an operating expense. The outsourced data center especially gives ComputerEase the flexibility to grow as needed: Rather than having to constantly buy more hardware and software as the business grows, it merely contracts for additional capacity from the outsourcing firm.

Regarding ComputerEase's in-person training, having its own training classroom enables the company to enjoy higher profit margins than its competitors who merely train corporate customers at their place of business.

While maintaining a classroom does incur the additional costs of rent and equipment, training classes held at ComputerEase's Corporate Training Center produce higher profit margins than classes conducted at customers' facilities ("on-site classes") or online.

ComputerEase management chose to lease rather than purchase its Corporate Training Center equipment and negotiated favorable lease terms with Wait's Electronics Emporium, enabling the company to upgrade its computers every 12 months. This not only significantly reduced the initial capital outlay, which would have exceeded \$100,000, but ensures that ComputerEase always has the latest technology for its students—a useful marketing, as well as educational, advantage.

**Problems Addressed**

A major part of the cost of high-quality corporate training is the teaching materials provided to each student. Although ComputerEase leverages all the development, writing, and updating work that goes into these materials for both its online and on-premises courses, that's still one of the biggest expense the company incurs. Materials are revised for each new software upgrade, so their average lifespan is less than 12 months.

To reduce materials costs, we develop all of our training materials, such as course manuals, for online publication only. Instead of receiving printed materials, each student receives a password to access training materials. This also helps the company be more green, by reducing paper use and waste. Although ComputerEase pays more in technical support than it would if course materials were printed, the net result is substantially increased profit margins.

A major operational challenge is staying on the cutting edge of instructional techniques, as technology evolves quickly and users demand richer experiences. This includes adopting updated online courseware platforms and incorporating into the training materials more-costly features such as audio and video.

ComputerEase emphasizes high-quality, productivity-oriented training. To help ensure quality, the company conducts interviews with each corporate client approximately one

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*Details ways to minimize inventory and cost of goods.*



### Technology Plan Preparation Form

*Using this form as a guide, summarize the key technology concerns and technology needs of your business, which you can then include in your business plan, either in a separate Technology section, or in the Operations section.*

Software Needs (specify on-premise and "in the cloud"):

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Hardware Needs:

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Telecommunications Needs:

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Personnel Needs (specify in-house or outsourced):

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*Use this information as the basis of your plan's Technology section.*

## SAMPLE PLAN: TECHNOLOGY PLAN

### TECHNOLOGY

ComputerEase is in the technology business. As such, we must always stay on top of new developments and continually upgrade not only our equipment, but also our skills.

The most critical component of our technology plan is making certain our course developers and instructors are fully capable of using new software in the most productive ways possible, so that they, in turn, develop appropriate training materials and train our students. To that end, our course developers and instructors receive pre-release copies of software programs and pre-release training from major software manufacturers.

Key to success is staying on the cutting edge of instructional design technology. We are partnering with experts in the field to stay abreast of new developments in interactive online courseware and anticipate adding enhancements as they are developed.

ComputerEase offers online classes. National competitors currently offer such training, and we want to be prepared to be able to take on such competition. Additionally, we believe our online programs will enable us to expedite our geographic reach into other areas not only in the Midwest and other parts of the U.S., but also into any English-speaking country.

Our Training Centers are also critical. One Training Center is already in operation, and we anticipate opening a second center by January 2015. This center will have 20 to 30 of the most up-to-date personal computers, 3 or 4 printers, overhead projection equipment, and other audiovisual equipment. We lease our computers for the Training Centers rather than purchase them; this enables us to always offer students the latest equipment.

Our company website contains background information on the company and lists the schedule and descriptions of training classes for both online and in-person training sessions. Students of corporate training classes taking place in our center can register for sessions online and access password-protected areas to receive additional assistance after completing their training sessions. This will enable us to provide more continual support for our corporate clients. Online students enjoy these same capabilities, in addition to access to their training sessions through the website.

ComputerEase has developed training materials and applications that can be accessed online not only via desktops, but also through smartphones and tablets. We recognize that users tend to rely on their phones and tables as their primary electronic devices. We have also made our online classes accessible via mobile devices.

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*Demonstrates how a technology-based company stays up to date.*

*Details necessary hardware.*

*Describes website and its capabilities.*

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### Management Plan Preparation Form

*List the key members of your management team, with a brief description of each person's relevant business background, responsibilities they have in your company, and the compensation they receive.*

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Board Members and Advisors: \_\_\_\_\_

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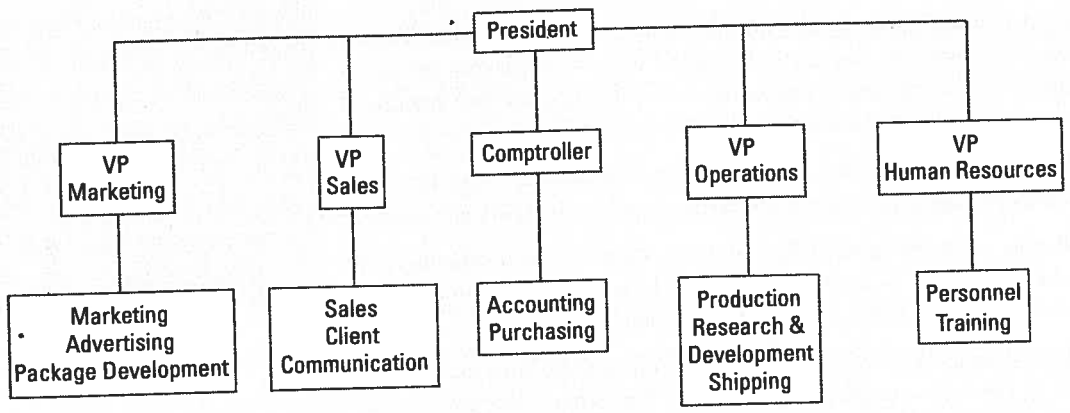
Management Structure and Style: \_\_\_\_\_

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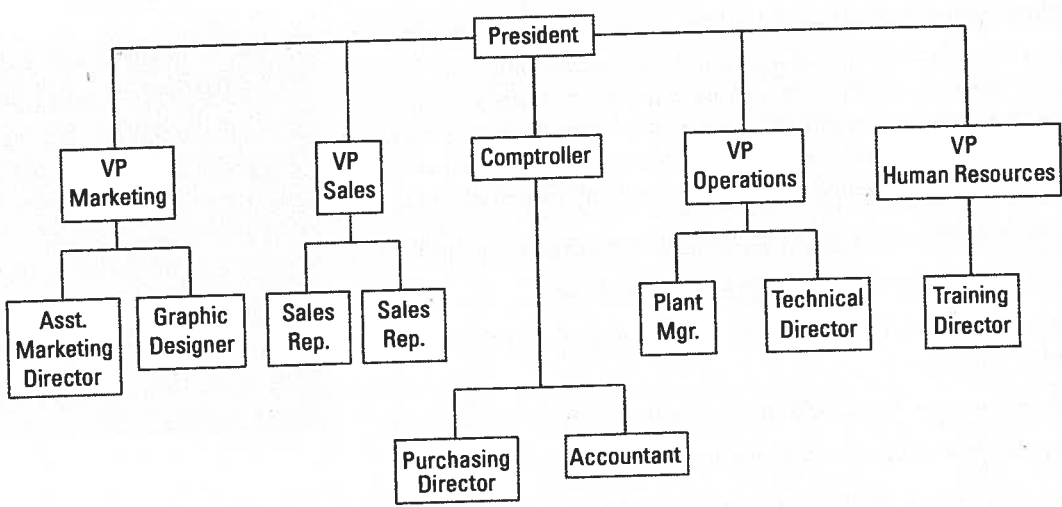
*Use this information as the basis of your plan's Management section.*

**EXAMPLE: FLOW CHARTS**

**AREAS OF RESPONSIBILITY**



**REPORTING RELATIONSHIPS**



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Plant  
3rd Party  
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