

Business Planning – Level 4

*Module Introduction
&

*Business Plan Insight

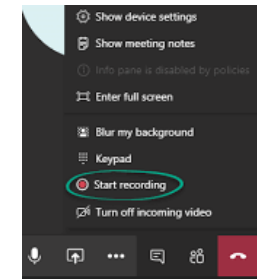
Lecture 1

Lecturer: Kathryn Flynn

Before We Start – Participation is Key!

In order to get the most out of our classes, there are some expectations around your commitment and participation during class time.

- Cameras on, with the required background
- Microphone muted unless speaking
- Active participation (we will remove students who do not respond when asked a question)
- All classes will be recorded



University Absence Policy

- Expects full-time students to attend all lectures and placement on a regular basis.
- The University does not sanction students taking holidays during term time.
- All absences must be reported in the first instance to their individual module tutor where possible at least 24 hours in advance, or in emergency circumstances prior to the start of the planned lecture.
- Students are expected to obtain medical evidence if absence is due to ill-health and to submit that evidence to the Module Tutor, copying in the Programme Manager.
- Any student who claims absence due to circumstances beyond their control **MUST** apply to the University by completing an ECP form (available on the Hwb). The decision as to whether an absence can be condoned will be made by the University **not** the module tutor nor the Programme Manager.
- Students who do not engage in lectures or miss the attendance register will be marked as absent.
- If students leave before the end of any timetabled session the module tutor will note that fact on the attendance register and the student will be deemed as not having attended that session.

Today's AIM is to...

- Get to know each other
- Learn about this module
- Learn about assessments
- Set expectations





Let me introduce myself.....

- ***Kathryn Flynn** (CONTACT INFO: kathryn.flynn@uwtsd.ac.uk)



Kathryn Flynn MPhil, BA (Hons) PGCE, PG Cert FHEA

Senior Lecturer / Uwch Ddarlithydd

- Kathryn started out working in the areas of sports and arts, covering various roles. She then went on to work in the tourism and hospitality sector, acting as a project officer on commercial based projects. This role involved working with a number of local / regional hotels and attractions. Kathryn then moved into Higher Education teaching and has since gained over 20 years of lecturing experience at UWTSd. Areas of teaching have included; Tourism, Business and Hospitality, covering a wide range of modules at under-graduate and post-graduate levels of study. To date, most of her teaching has been in the areas of Tourism and Business Management, which has given her great experiences - working with industry and travelling overseas as part of 'vocational' visits. During her time in education, Kathryn has also enjoyed research and over the years has published some articles, book chapters, and resource documents. Her particular passions are in the areas of global tourism management and cultural heritage. Kathryn is currently teaching on Levels 4 , 5 + 6 programmes across the University.*

➤ Qualifications:

BA(hons) – Leisure Management.

PGCE/FE

MPhil – Cultural Heritage (Industrial Heritage Tourism)

Misc : Industry Certs.



➤ Industry Experience:

Sports – Sports/Leisure Centres,

Arts+Culture – Museums / Theatres,

Tourism – Hotels /Activity Centres /Attractions....



➤ Roles / Teaching :

Previous Roles – Programme Manager / Level Lead / Placement Coordinator.

Over 20 years Experience –**Tourism / Events** / Business / Hospitality.



➤ Academic Research :

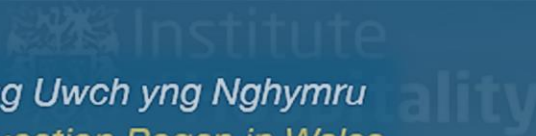
Articles / Book Chapters / Resource Documents.

Introduction of Students

About you...



Man Geni Addysg Uwch yng Nghymru
Where Higher Education Began in Wales



EAT SLEEP & DRINK
WHITBR



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

Tell me about yourself in 1 minute.

- Who are you?
- Where are you from?
- Do you currently work? - Any Engineering Experience?
- Your journey so far.....
- Expectations of module.

Accessing Module Information

There are two main ways that you are going to be able access information...

Microsoft Teams



Moodle



Any Module Questions - Get in Touch

REMINDER: It is important that when you contact anyone inside the University such as, either your Module Lecturer, your Year Leader or wider Support Team, that you use your **university email address**, this makes sure that we will be able to identify you properly, and you will have a prompt response!

Module Lead

Kathryn Flynn

kathryn.flynn@uwtsd.ac.uk

Module Introduction

Welcome to the Module

ACMA4015

"Business Planning"

Module Aims / Objectives



AIM(S)

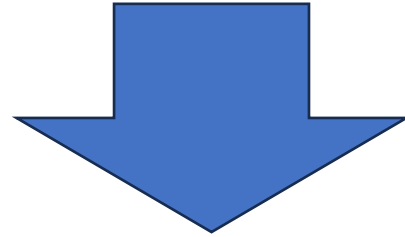
- To facilitate students' understanding of business planning and project management.

LEARNING OUTCOMES

Upon the successful completion of this module, the student should be able to:

- Assess the internal and external business environment using suitable tools
- and techniques;
- Understand the stages of a project and its components;
- Use appropriate project planning and management tools.

Indicative Content:



- Business Analysis in contemporary logistics systems.
- Business environment.
- Business planning.
- External environment.
- PEST / SWOT Analysis.
- Linear versus Circular Business Planning
-

KSB Links

- **Ks (Knowledge):** K2, K3, K5, K6, K7, K9, K12, K14, K15, K16, K19
- **Ss (Skills):** S1, S2, S6, S7, S8, S9, S17, S20, S21, S22, S23, S24, S27
- **Bs (Behavior):** B1, B4, B5
- This is an integrate degree apprenticeship. It is distinguished by the blend of employer defined knowledge, skills, and behavior outcomes that are integrated and assessed as part of the degree with recognition by a relevant professional body



Module Assignments & Deadlines



Assessment 1 (100%)

Due: 2nd December 2026



Assignment Title:

- At the end of this module, you will be expected to apply your gained knowledge and understanding of business planning by developing a “Business Plan” to be based on an organisation of your choice, (ideally your apprenticeship placement) or a wider independent case study.
- *Task Specifics :*
- You are to prepare a Business Planning Report to be based on your workplace and / or career aspirations. The purpose of the report is to demonstrate your understanding and knowledge of the business planning process, and your ability to apply business and management theoretical principles to a ‘real world’ industry setting.
- Your report should be professionally presented and provide a detailed evaluation of an organisation’s current operational position. Drawing on this evaluation, you should identify a relevant work based opportunity or challenge and develop an actionable plan to support future development.
- 1500 words (+/- 10%) – Excluding; Cover Page, Table of Contents, Executive Summary, AI Declaration, Diagrams, Pictures, Tables, Graphs, References, and Appendix).
- Submission will be through Turnitin on Moodle.

INDICATIVE NO OF WEEK & LECTURE	TOPIC	TEACHING TOOLS AND MATERIALS
W:1 Lecture: 1	Introduction and description of the module	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:2 Lecture: 2	Phase 1: Purpose and Strategy	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:3 Lecture: 3	Phase 1: Purpose and Strategy	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:4 Lecture: 4	Phase 2: Market Research	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:5 Lecture: 5	Phase 3: Competitive Marketing Strategies	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:6 Lecture: 6	Phase 4: Operations	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:7 Lecture: 7	Phase 5: Reviewing financing requirements and options	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:8 Lecture: 8	Phase 6: Business Controls	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:9 Lecture: 9	Phase 6: Business Controls	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises
W:10 Lecture: 10	Phase 7: Writing up and presenting your business plan	Audio-visual tools (PPT slides, videos), explanation, student participation and in-class exercises

ANY Questions so far.....??



ACCOR
rora
GROUP



Man Geni Addysg Uwch yng Nghymru
Where Higher Education Began in Wales

Institute
ality

EAT SLEEP & DRINK
WHITBR



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

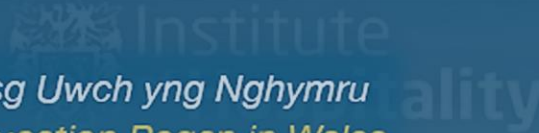
Module Discussion Questions:

Class Task

- *What is the purpose of Planning?*
- *What specifically is Business Planning?*
- *What is a Business Plan? - - Why would it be needed?*
- *What do you hope to get out of the module?*



Man Geni Addysg Uwch yng Nghymru
Where Higher Education Began in Wales



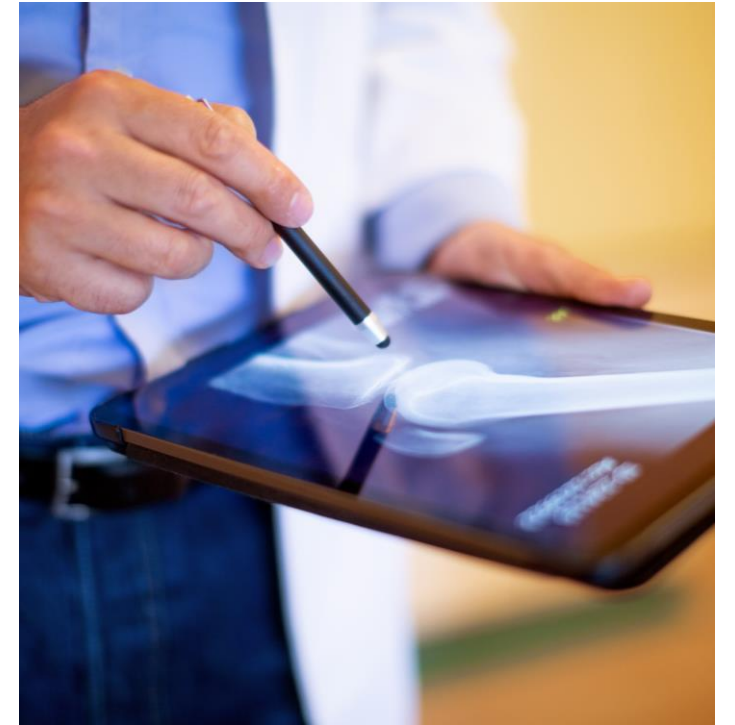
EAT SLEEP & DRINK
WHITBR



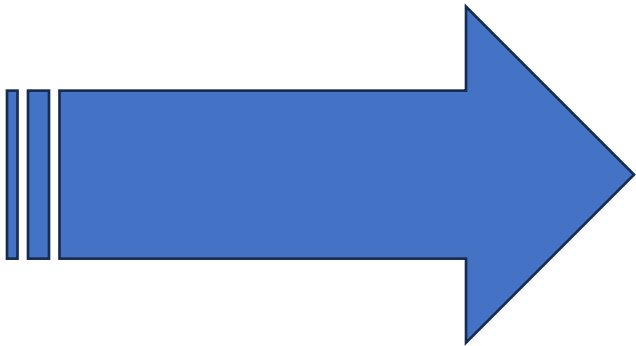
Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

What is a Business Plan?

- Business plan is a written document that includes your goals for the enterprise, both short and long term; a description of the products or services you will offer and the market opportunities you have anticipated for them, and finally, an explanation of the resources and means you will employ to achieve your goals in the face of likely competition.
- Preparing a comprehensive business plan along these lines takes time and effort.
- Once completed, your business plan will serve as a blueprint to follow, which like any map, improves the user's chances of reaching destination.



What is a Business Plan?



A business plan is an essential written document that provides a description and overview of your company's future. All businesses should have a business plan. The plan should explain your business strategy and your key goals to get from where you are now to where you want to be in the future.

How will you make your business more profitable, gain more resources or increase your assets?

What are your plans for growth in your target market?

Where do you see your business in one, three or five years?

Anyone who sets up a new company should have a business plan. It can also be an important tool for an established company that's moving in a new direction.

Source: UK Federation of Small Business, 2023

What is a Business Plan?

- Clarifies Business Model
- Outlines Strategy
- Lays Out Actions
- Illustrates Unique Value
- Illustrates Market Position
- Strategy on Hiring and Growth
- Projected Revenue & Profitability
- Work Culture Guide

Lines from a famous poem

**I keep six honest serving men
(They taught me all I knew)
Their names are What and Why and When
And How and Where and Who**

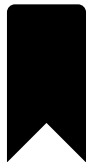
*Extract from "Just so stories", Rudyard Kipling,
1902*

Video Clips

- [Writing a Business Plan: What You Need to Know | It's a Money Thing](#)
- [\(1843\) How to Write a Business Plan Step by Step in 2025 – YouTube](#)
- [\(1843\) Business Plan Writing 101: Wharton Entrepreneurship Series – YouTube](#)
- [video on business plan necessity - Google Search - Google Search](#)
- [video on business plan necessity - Google Search](#)
- [Wix creation 30sec](#)
- [\(1843\) Business Plan Masterclass From Concept To Reality - YouTube](#)

Why Prepare a Business Plan?

- Essential for launching or expanding a venture
- Clarifies: **Goals** (short and long term) / **Products/Services** / **Market opportunities** / **Resources and strategies**.
- To understand the value of strategic planning – Future Planning.



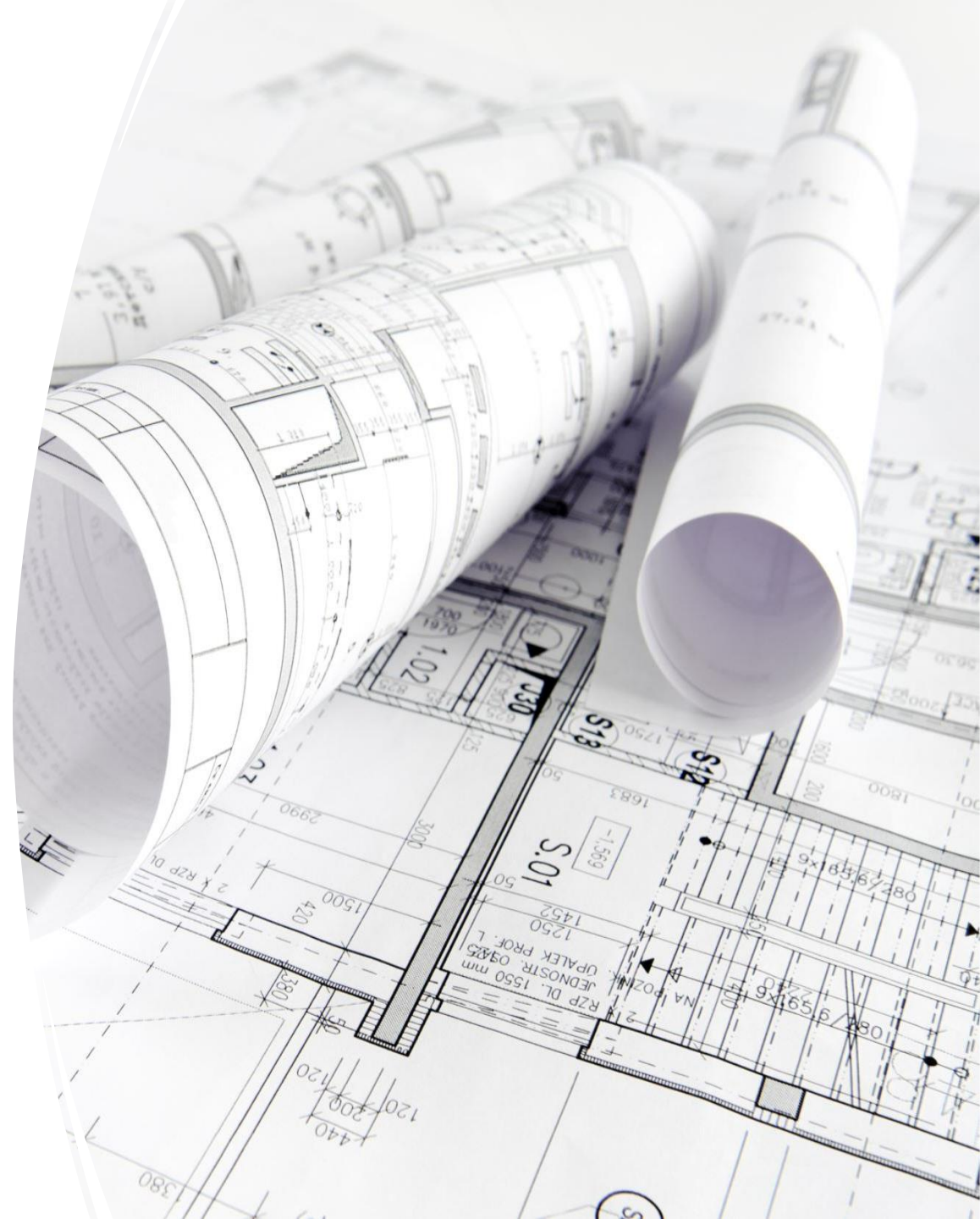
NB -Lack of a plan increases risk of failure!!!!



Saying: “Fail to Plan, Plan to Fail”

Time and Effort Required - -

- Estimated effort: **200–400 hours!**
- Depends on:
 - Business complexity
 - Existing data
- Outcome: A **BLUEPRINT** for success (*if done correctly!*)



Benefits of Planning - -

- Make mistakes on paper, not in the market
- Discover hidden risks and flaws early
- Example: Misjudging competition or pricing



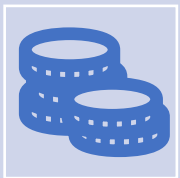
Confidence and Clarity



Boosts confidence in launching and operating



Can offset lack of capital or experience



Helps define:



How much money is needed
When and for how long

Reducing Risk - -

- Addresses under-capitalization and cash-flow issues
- Enables experimentation with strategies
- Focuses on **economic use of resources**



Business Plans help to Communicate a Vision

- Not a “passport” to funding—but a powerful tool to aid efficiency and effectiveness in the workplace.
- Demonstrates:
 - Entrepreneurial flair
 - Managerial talent
- Helps others understand and support your ideas.



Planning as a Process

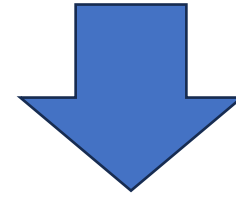
- The process is *more* valuable than the document
- Businesses and markets are dynamic – *processes can adapt*
- Planning builds adaptability and resilience





Evidence-Based Value

- Research shows:



- Planners are **twice as likely** to start a business and have success
- Grow **30% faster**
- **Less** likely to fail

Source: Parsons (2017)

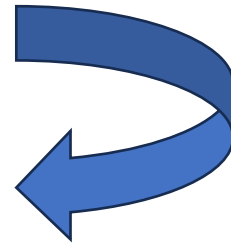


Common Misconceptions:

- Some view planning as a delay to action.

- Prefer spending time on:

- Premises
- Website
- Branding
-



In REALITY =

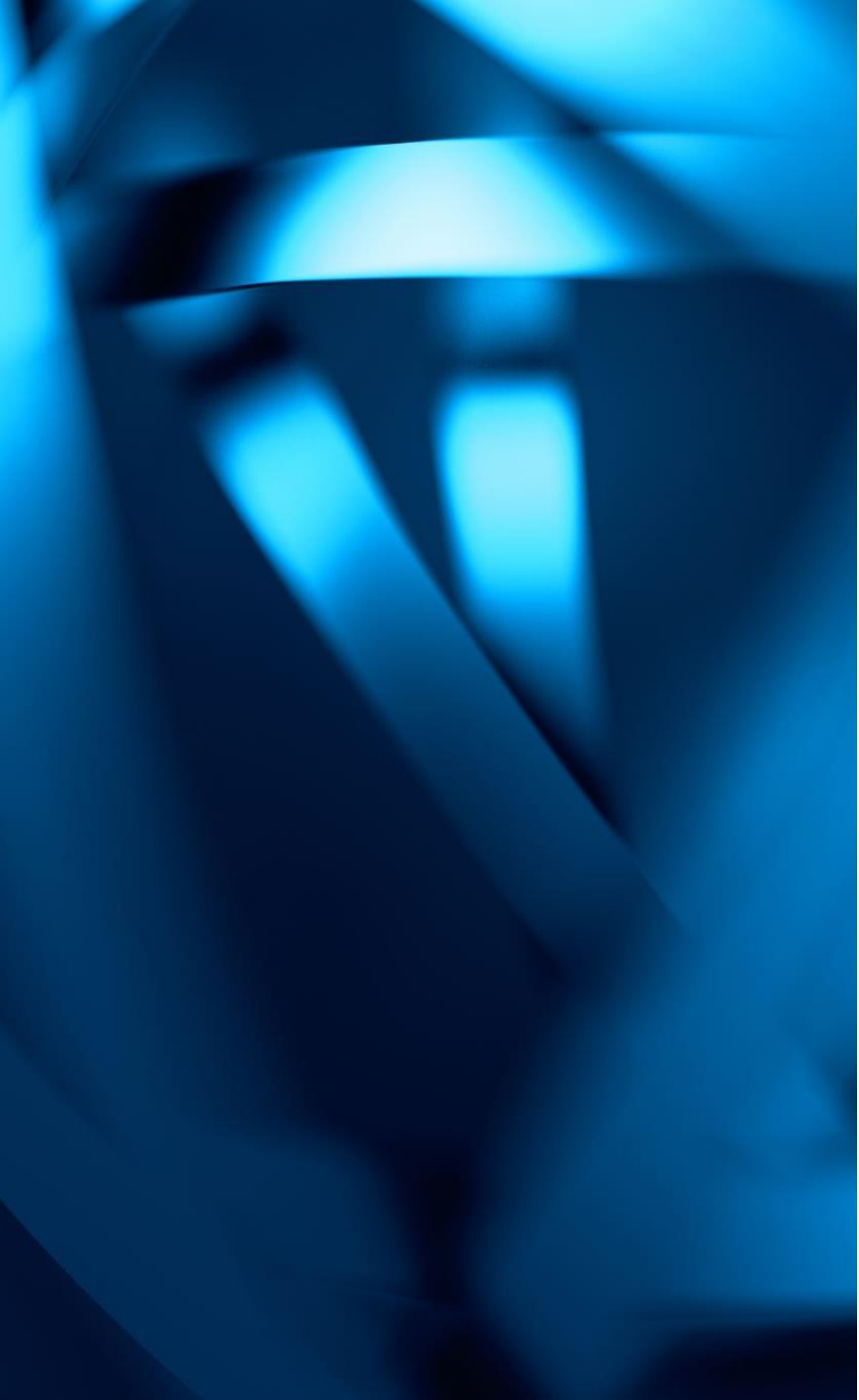
Planning can prevent costly **mistakes**

Lessons from the Dot-Com Era

Early internet ventures
skipped planning

Relied on vague “revenue
models”

Result: Many failed due to
lack of strategic foundation



Final Thoughts - Context.....

A Business plan is a
strategic necessity

Helps you:

- Think critically
- Avoid pitfalls
- Communicate effectively

Planning is the first
step toward
sustainable success

The Specifics:



The 7 Phases of Business Planning

A Strategic Framework for Innovation and Growth

Phase 1 – Strategy and Purpose

Phase 2 – Market Research

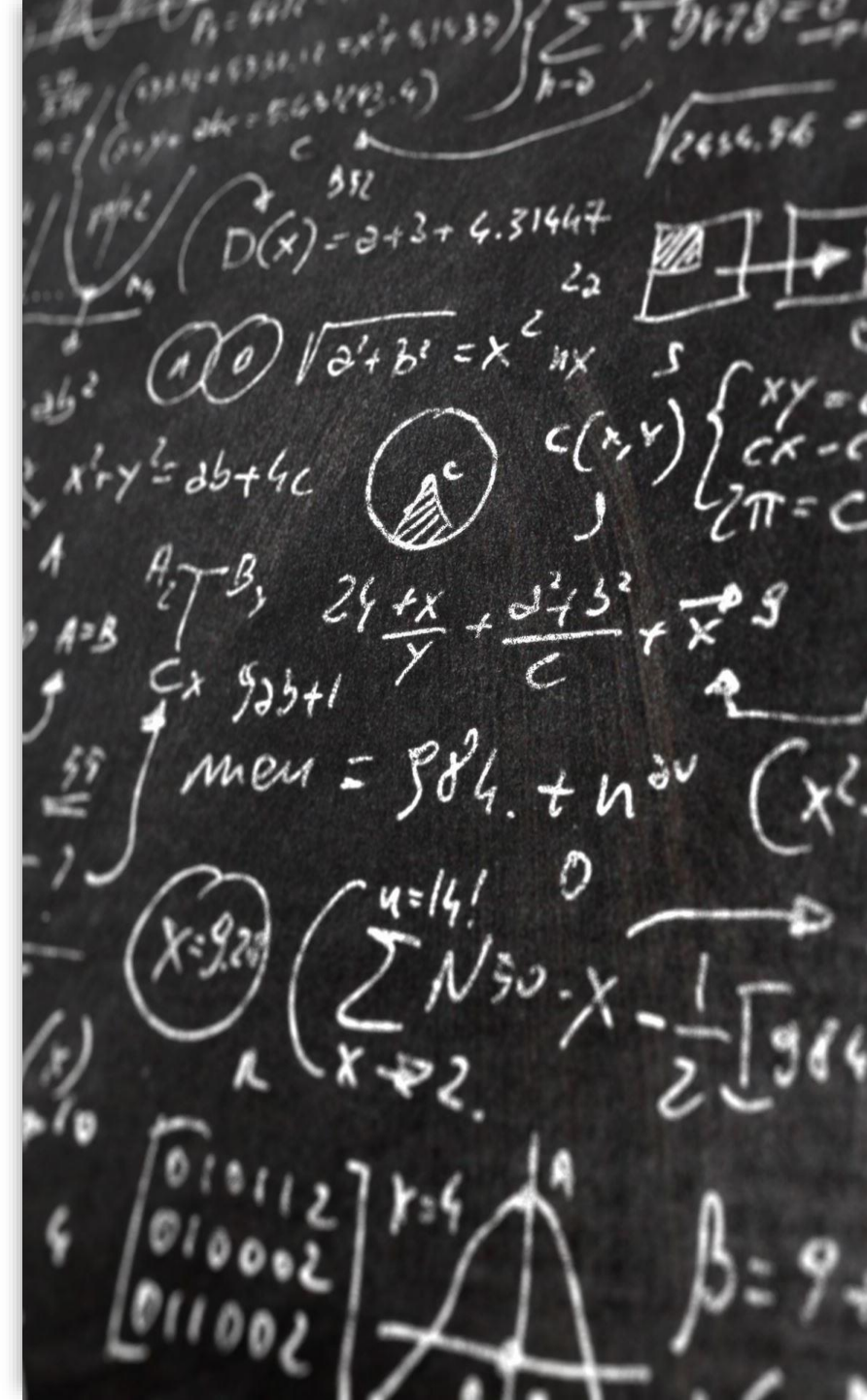
Phase 3 – Competitive Marketing Strategies

Phase 4 – Operations

Phase 5 – Reviewing Financing Requirements

Phase 6 – Business Controls

Phase 7 – Writing and Presenting the Business Plan



Group Task : Break-Out Rooms



- Discuss the 7 stages of Business Planning.
- Consider the stages and what they may involve.
- Can you relate to any practices that you have seen within industry / workplace (apprenticeship placement)?

Phase 1 – Strategy and Purpose



Overview of the Venture

Description of the organization, innovation, or business idea

Aims, objectives, and long-term aspirations



Management Team

Introduction of team members and relevant experience



Product/Service Description

Current development status

Proprietary rights (e.g., patents, copyrights)

Phase 2 – Market Research



Purpose of Market Research

Validate the need for the product/service
Inform start-up or growth strategy



Key Research Areas

Customer needs
Market segments
Competitor analysis



Methodology

Data sources and research techniques

Phase 3 – Competitive Marketing Strategies



Strategic Planning

Product/service positioning

Target market segments



Marketing Mix Decisions

Pricing strategy

Promotion and advertising

Distribution channels

Location strategy

Phase 4 – Operations

Operational Planning

- Manufacturing and purchasing
- Sales and distribution
- Legal and insurance considerations

Execution Strategy

- Aligning operations with business goals

Phase 5 – Reviewing Financing Requirements



Financial Forecasting

Sales volume and revenue projections

Profit & loss statement

Cash flow forecast

Balance sheet

Break-even analysis



Iterative Planning

Revisiting earlier phases based on new insights

Phase 6 – Business Controls



Monitoring Systems

Bookkeeping and accounting
Sales and marketing records
Customer and personnel files
Production control systems



Performance Tracking

Ensuring accountability and efficiency

Phase 7 – Writing and Presenting the Business Plan



Finalizing the Plan

Editing and rewriting for clarity and impact



Presentation Strategy

Preparing for meetings with stakeholders

Enhancing presentation skills

Importance of professional delivery

Summary & Next Steps



Recap of the Seven Phases

Examples of Business Plans to be provided next Lecture.



Importance of adaptability and iteration



Encouragement to begin planning **YOUR** “Business Plan” Assessment

ANY FINAL QUESTIONS?

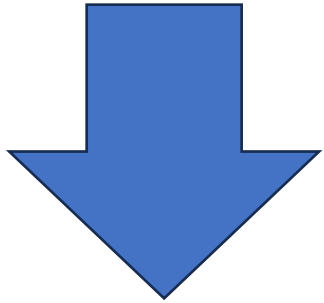


Man Geni Addysg Uwch yng Nghymru
Where Higher Education Began in Wales



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

NEXT WEEK



- Business Planning - Purpose and Strategy.



Man Geni Addysg Uwch yng Nghymru
Where Higher Education Began in Wales



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David