CRM Software

Business Plan

[YEAR]

A SAAS Business Plan

Prepared By

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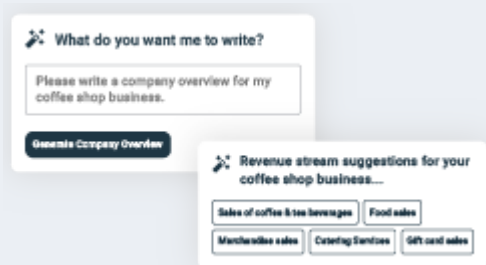
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1.

EXECUTIVE SUMMARY

The Product

The Competition and Panda CRM' Competitive Edge

The Market Opportunity

The Sales and Distribution Strategy

Sales Growth and Revenue Projections

The Management Team

Funding Request and Use of Funds

The Exit Strategy

The Product

Panda CRM

Panda CRM is a revolutionary cloud-based customer relationship management (CRM) platform. Panda CRM's gamification system is unlike any other CRM currently available on the market. With 70% of failed CRM dying primarily because of a lack of user adop...

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The Competition and Panda CRM' Competitive Edge

Panda CRM

CRMs are sold all over the internet, specifically by direct competitors of Panda CRM like Salesforce, Oracle, Dynamics CRM, and Sugar CRM. All of these CRM's offer similar tools as Panda CRM, yet none of them offer features such as Spider nor such

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The Market Opportunity

Panda CRM

Panda CRM's addressable market consists of small businesses – and the wage and salary sales workers of these businesses – that need a CRM system that organizes their customers' information easily and effectively while increasing sales volume and r

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The Sales and Distribution Strategy

Panda CRM

Panda CRM will sell its CRM through 3 primary sales channels: online, sales representatives, and partnering reseller individuals and businesses. Panda CRM will drive traffic to the website via an aggressive online marketing campaign and will build market aw

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Sales Growth and Revenue Projections

Panda CRM

In the first year, Panda CRM projects that it will sell 25,000+ 1-10 seat packages, 20,000+ 10-50 seat packages, and 16,000+ 50+ seat packages in year 1. By year 3, Panda CRM projects that it will attract 520,000+ 1-10 seat businesses, 420,000+ 10-50 seat busi

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The Management Team

Panda CRM

Panda CRM's founders are Bill Johnson (CEO) and John Bryant (CTO). Bill was the VP of marketing for Sugar CRM for 5 years. He helped the company grow to become a dominant player in the market before leaving to start Panda CRM. Bill is striving

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Funding Request and Use of Funds

Panda CRM

Panda CRM is currently seeking seed funding of $700,000. $223,000 will be spent on startup and organizational expenses such as development, rent, and office equipment, consultants, etc. The remaining $477,000 will be spent on sales, marketing, personnel,

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The Exit Strategy

Panda CRM

The most likely exit for Panda CRM will come from an acquisition by a major player or such as Salesforce, Oracle, and Dynamics CRM once the Company reaches 500,000+ company clients. A few recent mergers of CRM companies include Oracle acquiring Vir

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2.

MISSION & VISION

MISSION STATEMENT

CORE PURPOSE

CORE VALUES

MISSION STATEMENT

Panda CRM

Panda CRM's mission is to help its clients improve CRM adoption rates, increase sales volume and frequency, gain customer loyalty and decrease customer service and sales costs by providing a user-friendly, innovative, and powerful CRM system.

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CORE PURPOSE

Panda CRM

Panda CRM's core purpose is to provide more efficiency and value in small business owner's relationships so that they can achieve their goals.

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CORE VALUES
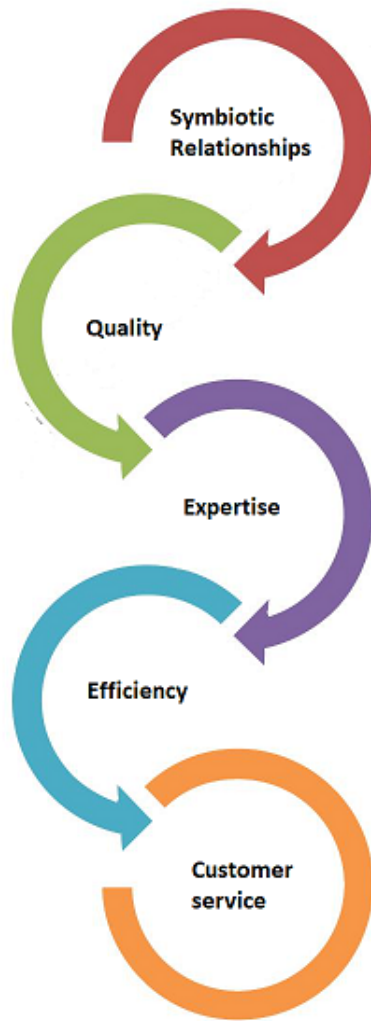
3.

<div style="background: blue; color: white;">
PRODUCT & SERVICE DESCRIPTION
</div>

OVERVIEW OF PRODUCTS & SERVICES

PROBLEMS, CAUSES, SOLUTIONS & BENEFITS

OVERVIEW OF PRODUCTS & SERVICES

Panda CRM

Panda CRM is a revolutionary cloud-based customer relationship management tool. Like many CRM's currently on the market, Panda CRM helps businesses stay connected to their customers, clients, partners, and employees by providing the following

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PROBLEMS, CAUSES, SOLUTIONS & BENEFITS

Panda CRM

The current problems in the market and the main causes of these problems are presented below:

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Panda CRM

The solutions that Panda CRM presents and the benefits associated with using Panda CRM are presented below:

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Upmetrics vs Business Plan Templates

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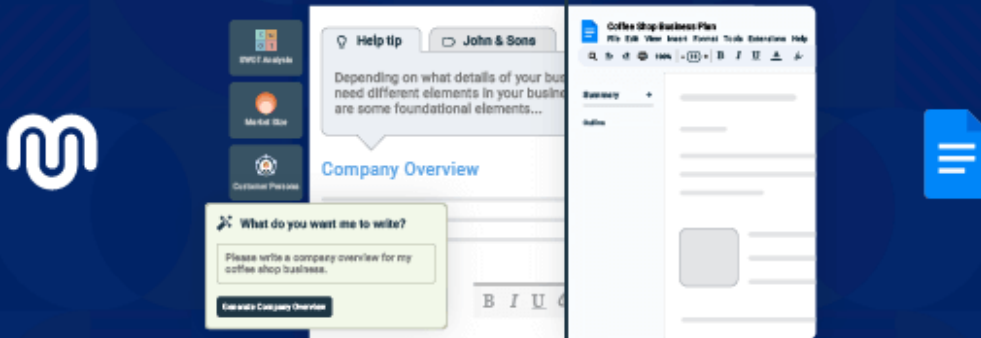
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4.

INDUSTRY ANALYSIS

INDUSTRY OVERVIEW

SAAS AND CRM INDUSTRY SIZE AND TRENDS

INDUSTRY OVERVIEW

> **⊟ Panda CRM**
>
> Panda CRM falls under the Cloud Computing Industry as a Software as a Service Provider (SaaS) as well as a CRM Provider. These industries are booming, and with new technological developments and growing relevance in global markets, these industr~~~~~~~~~~~~~~~~~~~~~
>
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Start writing here..

> **⊟ Panda CRM**
>
> In the past decade, there have been numerous changes in the way business is conducted online. Previously, the software was an integral part of any business operation, as it was standard for numerous industries yes still customizable. Unfortunately~~~~~~~~~~~~~~~~~
>
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Cloud Computing Industry

Start writing here..

> **⊟ Panda CRM**
>
> While many cloud computing businesses offer time and money-saving processes and services, the Software as a Service (SaaS) sector, in particular, has been the fastest growing and most popular in the cloud. As a result, Panda CRM's entrance into the mark~~~~~~~~~~~~
>
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SaaS Industry

Start writing here..

> **⊟ Panda CRM**
>
> Customer Relationship Management (CRM) is a business strategy directed to understand, anticipate, and respond to the needs of an enterprise's current and potential customers in order to grow the relationship value. Initially emerging as a database marke~~~~~~~~~~~~~~
>
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CRM Industry

Start writing here..

SAAS AND CRM INDUSTRY SIZE AND TRENDS

Panda CRM

CRM, SaaS and the cloud computing industry as a whole is a subsector of the Data Processing and Hosting Services Industry, which was projected to total $81.3B in 2012 in the U.S.4 Leading research company Gartner estimates that the U.S. SaaS market, in pa

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Industry Size

Start writing here..

Panda CRM

Although SaaS is the most popular cloud computing service, industry shifts in how cloud computing is utilized will be an up and coming trend for the next few years. The more robust of a service package offering the Company can provide, including servic

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Industry Trends and Key Factors

Start writing here..

5.

COMPETITIVE ANALYSIS

COMPETITIVE OVERVIEW

DIRECT COMPETITORS

INDIRECT COMPETITORS

COMPETITIVE ADVANTAGES

MARKET SHARE ANALYSIS

BARRIERS TO ENTRY

COMPETITIVE OVERVIEW

▭ **Panda CRM**

The competitive field within the CRM industry is diverse with a multitude of systems-based solutions available to businesses.

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▭ **Panda CRM**

Panda CRM's most direct competitor is Zurmo, the only web-based, stand-alone CRM system that offers gamification features to encourage user participation. Other direct competitors, such as CRM Gamified and WaveAccess, are CRM add-ons that apply

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Direct Competitors:

Start writing here..

▭ **Panda CRM**

Panda CRM's indirect competitors consist of web-based CRM systems that offer a wide range of business management services that are not solely focused on traditional CRM applications. Indirect competitors include:

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Indirect Competitors:

Start writing here..

DIRECT COMPETITORS

Panda CRM	Zurmo	ga

Owner/CEO	Bill Johnson, CEO	Jason Green	Subsidiary of UruIT DynamiX
Headquarters	San Diego, CA	Cliffton Park, New York	Miami, Florida
Year Founded	2012	2012	2011
Website URL	SolidSolutions.com	Zurmo.org	CRMGamified.com
Phone #	555--555--5555	N/A	N/A
Type of Entity	Private	Private	Subsidiary
# of Employees	5	25+	N/A
Product Overview	Web--based CRM that encourages user adoption, increased sales frequency and volume, increased customer retention and loyalty and decrease customer service and sales cost	Open sourced, web - based CRM that is mobile, social and gamified	Add--on to Microsoft's D applies gamification techniques to encoura users by rewarding them for t achieved goals
Key Features	Spider gamification platform, contact management, activity management, deal tracking, security, personalize, social media integration, sales funnels, financial analytics, and reporting, email/phone integration, mobile application	Gamification platform, contact management, activity management, deal tracking, security, personalize, social media integration, sales funnels, financial analytics and reporting, email/phone integration, mobile application	Combines high professionalism with fu competition between us teams, oriented to measure results, customizable actions a rewards, social integration
Pricing	$15, $30, $40, and $60/month depending on # of users	Free while in beta/testing	N/A

Strengths	Unique, customizable, applicable to multiple industries, easy to learn/use, effective	Unique, first gamified CRM to market, customizable, applicable to multiple industries	Customizable, applicab industries, sold on Mic Marketplace (PinPoint)
Weaknesses	New to the industry	New to the industry, still in beta/testing, no proof of concept	Tied to Microsoft Dynamics CRM and n

INDIRECT COMPETITORS

The following table provides information on the businesses that the Company has identified as indirect competitors:

	MINDBODY	ZOHO Work · Online	Biz Automation	The Small Business Web
Owner/CEO	Rick Stollmeyer Founder and CEO	N/A	Carl Zaldivar, CEO	Pamela O'Hara, CEO
Headquarters	San Luis Obispo, California	Pleasanton, CA	Redondo Beach, CA	N/A
Year Founded	1998	2005	2001	N/A
Website URL	MindBodyOnline.com	Zoho.com	BizAutomation.com	TheSBWeb.com
Phone #	877.755.4279	888.900.9646	888--224--3227	N/A
Type of Entity	Private	Private	corporation	corporation
# of Employees	N/A	1,500	N/A	N/A
Product Overview	A software company that offers different management solution options based on the industry	Offers a variety of online business, productivity, and collaboration applications	Run your entire business on one system	integration tools for small businesses

Features	Management software, mobile applications, merchant account processing, hardware, and IT solutions	Organizers, CRM, billing solutions, online database, document management, and more	CRM, marketing email campaigns, project management, online customer surveys	CRM, marketing email campaigns, project management, invoicing, SMS, website, accounting, appt scheduling
Pricing	Varies depending on service	$12/month/ user	Min 2 users: $49/month/user Min 25 users: $795/month/user	Varies based on service
Strengths	Various types of management solutions tailored to specific industries	Large pool of applications that businesses can take advantage of, relatively inexpensive	On--demand all--in--one super--suite, easy to direct webpage	Incorporates other companies well
Weaknesses	Only focused on Health and Wellness	Lack of differentiation	No invoicing, storefront, accounting	No actual company information available

Additional indirect competitors include Batchbook, Leopard CRM, Sugar CRM, Free CRM, and Tactical CRM.

COMPETITIVE ADVANTAGES

🏷 **Panda CRM**

Panda CRM's main competitive advantage compared to the numerous CRM alternatives available on the market lies within the Company's Spider gamification platform. This platform integrates with the Company's more traditional features (contact man~~~~~~~~

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Competitive Advantage

Gamification
Spider gamification tools to increase user adoption

Loyalty program
Loyalty program application to engage customers and referral partners

Thirdparty integrations
Social media, email, phone and mobile app integration

Customizations
Customizable actions, rewards, levels and bages makes the platform applicable to any industry

State-of-the-art CRM
State-of-the-art CRM (contact and activity management, sales funnels, financial analytics, reporting, etc)

MARKET SHARE ANALYSIS

The CRM industry is highly saturated and competitive, yet highly fragmented. Salesforce's market share was 16.7% in 2011, second only to SAP, and is expected to be the leading CRM vendor worldwide by 2013. SAP continues to be the worldwide leader in CRM software sales, with Salesforce ascending to second place. Oracle was displaced by Salesforce in 2011, a trend that is projected to accelerate through 2013. The market share (in millions of dollars) for the top 10 CRM software vendors from 2009--2011 is shown below:

2010 Rank	2011 Rank	CRM Vendors	2009	2010	2011	Share % 2010	Share % 2011	Growth 2010	Growth 2011
1	1	SAP	1,862.3	2,006	2,324	18.9	19.3	7.7	16.3
2	3	SalesForce	1,522.8	1,749	2,006	16.5	16.7	14.9	35.9
3	2	Oracle	1,166.5	1,476	1,918	13.9	16.0	26.6	9.7
4	4	Microsoft	690.8	793.3	901.0	7.5	7.5	14.8	13.6
5	5	Amdocs	389.8	408.5	434.1	3.9	3.6	4.8	6.3
6	6	Adobe	26.3	310.4	425.9	2.9	3.5	1,080.6	37.2
7	7	IBM	284.2	223.1	358.4	2.9	3.0	8.1	60.6
8	8	SAS Institute	43.3	223.1	344.8	2.1	2.9	414.9	12.2
9	9	Cegedim	222.6	218.7	232.3	2.1	1.9	--1.8	6.2

11	10	RightNow Technologies	115.4	147.4	187.4	1.7	1.6	14.6	27.1
		Other Vendors	2,958.5	3,026	2,883	27.7	24.0	2.3	--4.7
		Total CRM Market	9,285.6	10,583	12,016	100.0	100.0	14.2	13.5

The companies holding the majority of the market offer tools, add-ons, and other resources for users to customize their CRM software. While the industry is highly competitive, Panda CRM benefits from several competitive advantages, as outlined above, allowing the Company to differentiate itself from the current field and capture a decent percentage of the overall market.

BARRIERS TO ENTRY

The following is an analysis of the barriers to entry that businesses within the software industry face:

🏷 **Panda CRM**

The most significant barrier to entry is market saturation in both the CRM and ASP industries. Unless a new entrant to the market can significantly differentiate itself from its competitors, there are many applications that offer the same or similar features. F

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Market Saturation

Start writing here..

🏷 **Panda CRM**

Although not a strict barrier to entry, the beta and usability test period for software applications is critical. The functionality and stability of Panda CRM will be important to "get right" the first time given how quickly technology changes and how discerning CRM

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Beta and Usability Testing

Start writing here..

Patents & Copyrights

Start writing here..

6.

MARKET ANALYSIS

Market Snapshot

ADDRESSABLE MARKET

B2B MARKET SEGMENTATION

IDEAL CUSTOMER PROFILE

Market Snapshot

Panda CRM

- There are 27.9M small businesses in the U.S.
- There are over 13M wage and salary sales workers in the U.S. as of 2010
- The largest four industries utilizing CRM software are Educatio...

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ADDRESSABLE MARKET

Panda CRM

Panda CRM's addressable market consists of small businesses– and the wage and salary sales workers of these businesses – that need a CRM system that organizes their customers' information easily and effectively while increasing sales volume and r...

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Panda CRM

The Small Business Association (SBA) defines a small business as having fewer than 500 employees, though there is some slight variance in this definition depending on the industry. According to the SBA's most recent published data, there were 27.9M...

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Small Businesses – Market Size

Start writing here..

Wage and Salary Sales Workers– Market Size

According to the U.S. Bureau of Labor of Statistics, there were over 13M wage and salary sales workers in the U.S. in 2010. The following table provides information about select U.S. sales occupations in 2010:

Occupation	Number of Employees	Average Wage
Sales representatives (wholesale and manufacturing, except technical and scientific products)	1,367,210	$52,440

Sales representatives (services, all other)	531,410	$50,620
Sales representatives (wholesale and manufacturing, technical and scientific products)	381,080	$73,710
Insurance sales agents	318,800	$46,770
Securities, commodities, and financial services sales agents	276,290	$70,190
Real estate sales agents	153,740	$40,030
Advertising sales agents	145,160	$45,350
Sales engineers	66,060	$87,390
Real estate brokers	41,210	$54,910

While there are numerous occupations within the sales industry, most occupations fall into the education, manufacturing, retail & wholesale, or utility categories. Manufacturing and retail sales occupations have the highest number of employees, with 1.3M spread across the nation. Service sales representatives generally fall under the utility or education category, as such sales representatives generally sell consulting services, telecommunication services, or other service-based solutions such as insurance or financial advice.

B2B MARKET SEGMENTATION

Panda CRM will specifically target the education, manufacturing, retail & wholesale, and utility industries as these are the largest markets that utilize CRM systems. The following table provides information on these industries:

	Education Industry	Manufacturing Industry	Retail & Wholesale Distribution Industry	Utilities
Industry Need for CRM	Allow institutions to build stronger relationships with students and other constituents. Institutions are targeting admissions and enrollment, student services and financial aid as the areas driving CRM investment.	Provides the basis to respond to a new customer-centric, and customer-driven business model and integrate multiple partner channels for a holistic customer view.	Provide complex pricing and promotions, sophisticated discounting permutations, Radio Frequency Identification (RFID) and bar code scanning, real-- time integration with Point of Sales (POS), terminals, and extended integration with Supply Chain Management (SCM) systems.	Provides increased workflow automation, electronic bill presentment and payment (EBPP), self-- service, mobile field service, and CRM analytics in order to respond to external pressures.
Types of CRM Utilized	Oracle's PeopleSoft, SunGard, SAP, Oracle, Talisma, Onyx and RightNow	Siebel Systems, SAP, Oracle, Avaya, Dendrite, Genesys, SSA, QAD, Fair Issac, Pivotal, Infor, and Microsoft.	Reynolds and Reynolds, SAP, Avaya, Lawson, Fair Issac, Oracle, Genesys, Omniture, and Siebel Systems.	Siebel Systems, SAP Aspect Software, SPL WorldGroup, Avaya, Genesys, and Oracle
Company Examples	Colleges and Universities in both North America and Europe.	Kawasaki Motors, Brandrud Furniture and Milacron.	IBM, Alta Resources, Three Rivers Pharmaceuticals, BlueCross BlueShield and American Airlines.	America Online, Gaz Metropolitan Plus, and AGL Resources.

IDEAL CUSTOMER PROFILE

Panda CRM

is a The Ideal Customer for Pand owner with a company of 1--100 employees or an employee within such a comp

Start writing here..

7.

SALES & MARKETING PLAN

SALES & MARKETING GOALS

SWOT Analysis

PRICING STRATEGY

BRANDING

MARKETING STRATEGIES

SALES & MARKETING GOALS

▭ Panda CRM

Panda CRM will sell its CRM through 3 primary sales channels: online, sales representatives, and partnering re-seller individuals and businesses.

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▭ Panda CRM

The charts below provide Panda CRM's marketing goals for online sales based on the following assumptions:

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Online Traffic

Start writing here..

New Demos (Units) - Online

Financial Year	New Demos	Sales from Demos
2018	10,737	161
2019	70,079	1,051
2020	182,242	2,734

Financial Year	New Demos	Sales from Demos
2021	295,567	4,434
2022	360,030	5,400

Active Businesses (Units) - Online Traffic
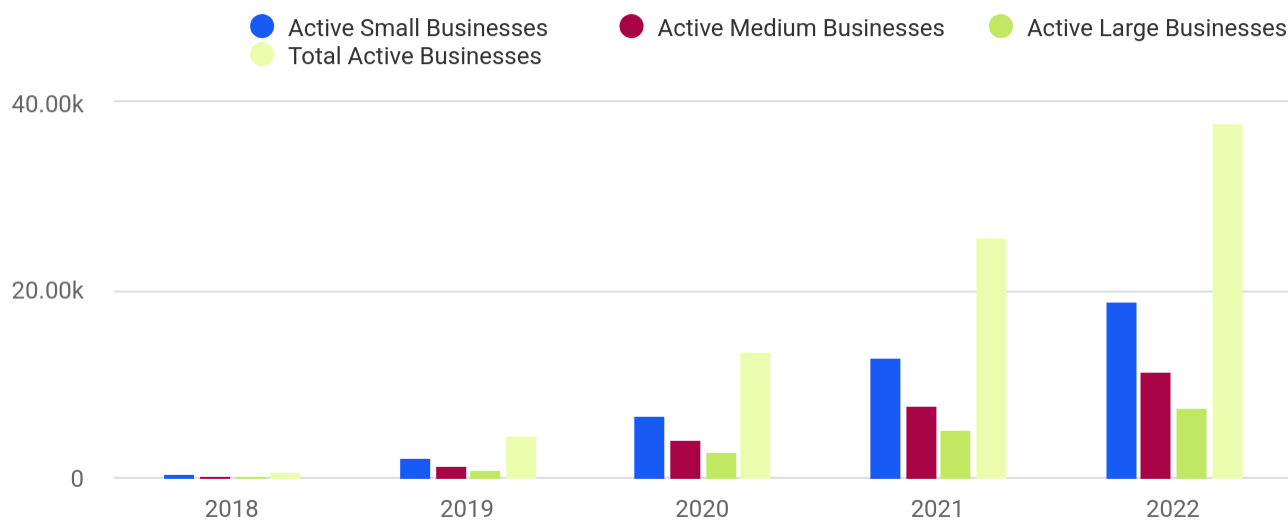
Financial Year	Active Small Busi…	Active Medium Bu…	Active Large Busi…	Total Active Busin…
2018	321	192	128	641
2019	2,231	1,339	892	4,462
2020	6,691	4,015	2,676	13,382
2021	12,886	7,731	5,154	25,772
2022	18,928	11,357	7,571	37,855

▱ Panda CRM

The chart below provides Panda CRM's sales and marketing goals for sales representatives based on the following assumptions:

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Sales Representatives

Start writing here..

Active Businesses - Sales Representative

Legend:
- ● Active Small Businesses (Units)
- ● Active Medium Businesses (Units)
- ● Active Large Businesses (Units)
- ● Total Active Businesses (Units)

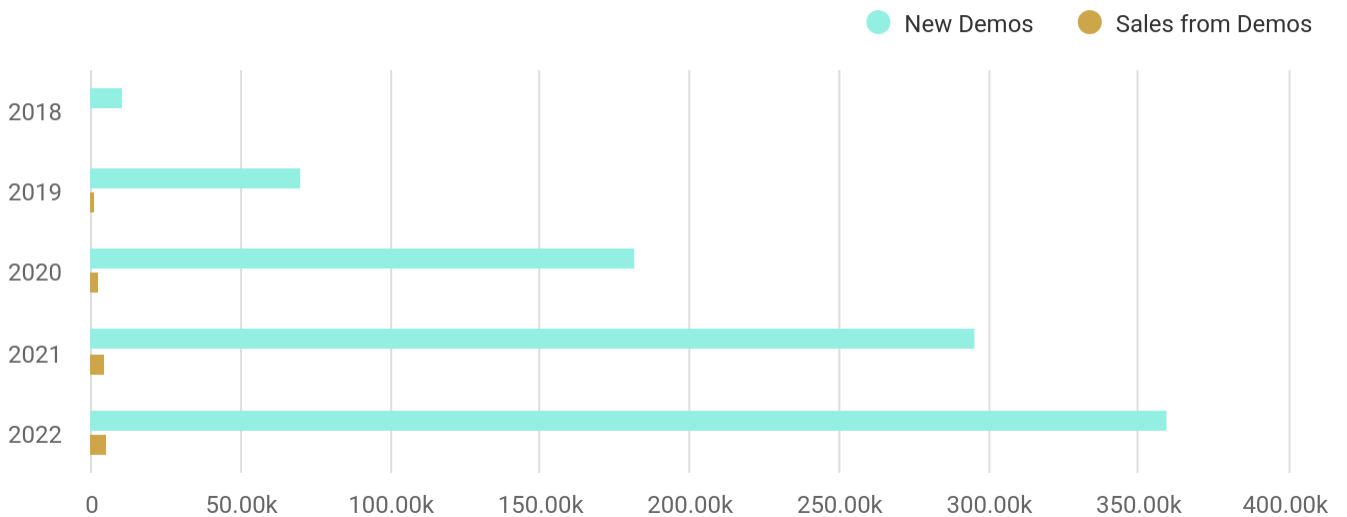| Financial Year	Active Small Busi...	Active Medium Bu...	Active Large Busi...	Total Active Busin...
2018	817	681	545	2,043
2019	1,781	1,484	1,187	4,453
2020	3,678	3,065	2,452	9,194
2021	6,458	5,381	4,305	16,144
2022	11,394	9,495	7,596	28,485

> ▭ **Panda CRM**
>
> The chart below provides Panda CRM's sales and marketing goals for resellers sales based on the following assumptions:
>
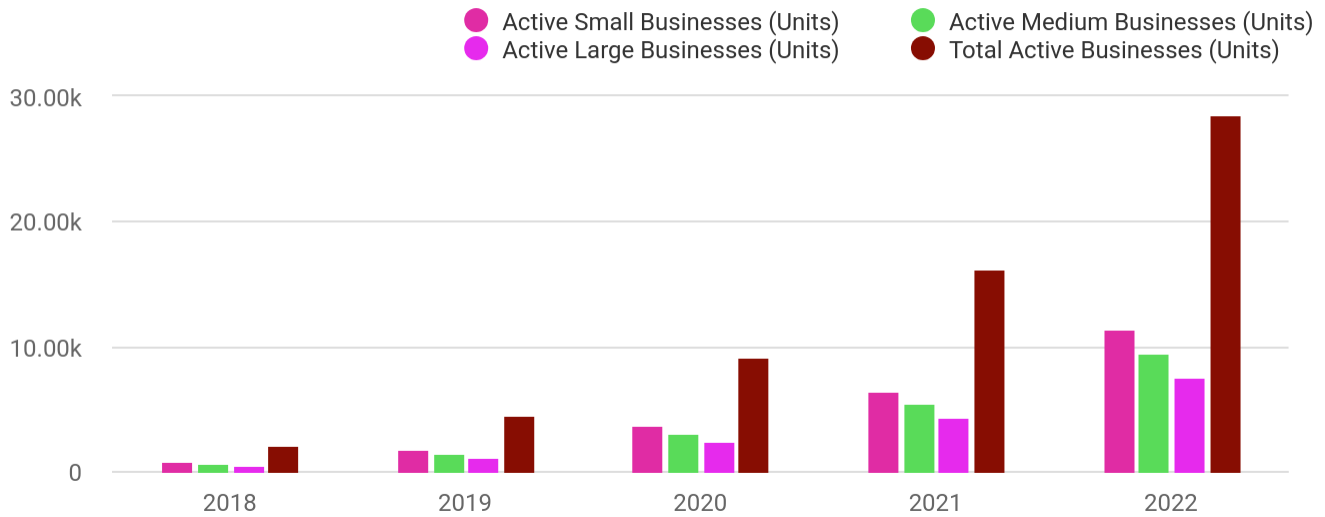> To unlock help try Upmetrics! 🔒

Resellers

Start writing here..

Active Businesses (Units) - Re sellers
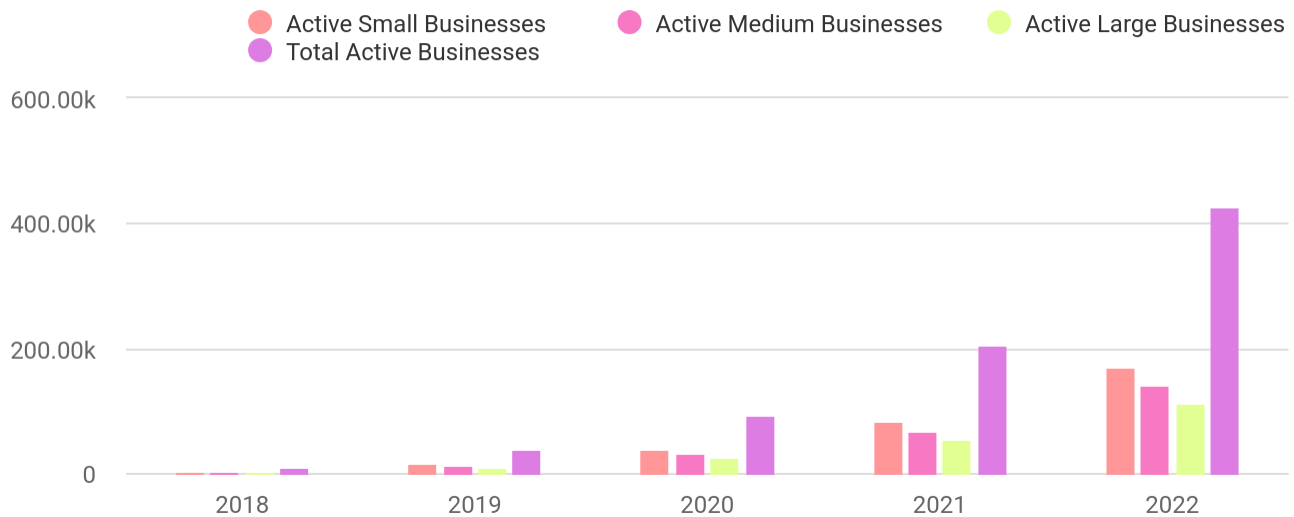
Financial Year	Active Small Busi…	Active Medium Bu…	Active Large Busi…	Total Active Busin…
2018	4,101	3,417	2,734	10,251
2019	15,440	12,867	10,294	38,601
2020	37,668	31,390	25,112	94,170
2021	82,721	68,934	55,147	206,802
2022	170,410	142,008	113,606	426,024

SWOT Analysis

The following chart provides information on the Company's strengths, weaknesses, opportunities, and threats for entering the market.

Strength	Weakness
• Easy to use • Competitive price • Free trial and effective up-sell strategy • Diligent customer service • Connection generator • Tarantula gamification platform • Effective as a loyalty program • Experienced management team	• Large, fragmented market with numerous competitors • Capital restraints • New to industry, little to no market recognition at the time of launch

Opportunity	Threat
• Large market size	• Continuous software revolution
• Internet lends to global market	• Low barriers to entry for competition
• Numerous marketing channels	• Economic Recession
• Staying on top of software revolution	• Wide market variety

PRICING STRATEGY

Panda CRM

Panda CRM will offer a free, demo version of the CRM via the Company's website for a limited trial basis in order to attract potential paying customers. Panda CRM will charge small businesses that require up to 10 logins $20 per month. Businesses th

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BRANDING

Panda CRM

In order to enforce a brand identity, Panda CRM wants customers to associate effectiveness, organization, relationships, reliability, professionalism, and success with its name. Panda CRM wants them to think of easy to use the system, strong connections, a

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Branding Strategy

Start writing here..

Company Overview	
Words Customers Should Associate with the Company	Effectiveness, Organization, Relationships, Reliability, Professionalism, Success

Company Overview	
Related Words	Easy to Use, Strong Connections, Friendly Environment, Productive Workforce
Mission Statement	Panda CRM gives small businesses the ability to enhance their customer relationships by providing a user-friendly, innovative, and powerful CRM system that is efficient and has unparalleled customer service.
Core Values	Quality, Efficiency, Expertise, Customer Service
Services Offered	Panda CRM System
Specialty	An efficient and easy to use the system that will save users time in managing relationships.
Target Market	Business Consultants, Retailers, Advertising Agencies, Software Publishers, Accountants, and other Small Business Owners
Terms Used that Show the Connection Between the Company and the Target Market	Making Lives Easier, Saving Small Business Owners from Headaches
What Sets the Company Apart from the Competition	Panda CRM cares about the fact that small business owners are strapped for time and offers a simplistic CRM system that makes their lives less hectic.

Panda CRM Brand	
Business Name	Panda CRM
Unique Selling Position	Panda CRM gives customers freedom in their lives by offering them a solution to time-consuming relationship management software. Also, the Spider connection generator is unlike any technology in existence.
Tagline	"Relationships Made Easy"

MARKETING STRATEGIES

Panda CRM

- Online Marketing
  - Website
  - SEO

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Panda CRM

Panda CRM's online marketing strategies consist of a well--optimized website, search engine marketing tactics, paid ads, social media, e--newsletters, blog marketing, and viral video clips.

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Online Marketing

Start writing here..

8.

OPERATIONS PLAN

LOCATION

STAFFING AND TRAINING

PERSONNEL PLAN

CUSTOMER SERVICE

PURCHASING PROCEDURES

QUALITY CONTROL MEASURES

LOCATION

⊳ Panda CRM

The headquarters is under leasing contract located at the following address:

123 Smith Street, Suite 1

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Start writing here..

STAFFING AND TRAINING

⊳ Panda CRM

Staff will be hired according to recommendations, experience, and education in their field. A high standard will be kept through the training manuals for new employees and will be given a mentor to shadow for the first 2 weeks of arriving. Later a checklist w̶i̶l̶l̶ ̶b̶e̶ To unlock help try Upmetrics! 🔒

Start writing here..

PERSONNEL PLAN

The following table outlines Panda CRM 5 year hiring plan including starting salaries and hiring dates:

Position	Starting Salary	Hiring Date
CEO	$80,000	Month 1
CFO	$75,000	Month 1
CTO	$75,000	Month 1
CMO	$60,000	Month 1
Lead Front End Engineer	$60,000	Month 1
Lead Back End Engineer	$60,000	Month 1
Lead UI/US Engineer	$60,000	Month 1
Sales Representatives	$30,000	Month 1
Customer Service Representatives	$30,000	Month 1

Position	Starting Salary	Hiring Date
Sales Manager	$50,000	Month 1
Marketing Manager	$50,000	Month 1
Front End Engineer Support Staff	$80,000	Month 13
Back End Engineer Support Staff	$80,000	Month 13
UI/US Engineer Support Staff	$80,000	Month 13
Sales & Market Assistants	$50,000	Month 13
Controller	$50,000	Month 13
Bookkeeper	$30,000	Month 13
Administrative Assistants	$35,000	Month 13

CUSTOMER SERVICE

☐ **Panda CRM**

Customer services provided by Panda CRM will be done through the company's webpage as a SaaS as well as through designated customer service agents. Panda CRM's unique competitive advantage of having software that learns what the user is looking for

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PURCHASING PROCEDURES

☐ **Panda CRM**

All of Panda CRM purchases are done over the phone or placed online through an online shopping cart system that will be added to the company's website. Credit cards will be charged 1-3 business days after the initial purchase, barring any unforeseen co

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QUALITY CONTROL MEASURES

Panda CRM

Panda CRM will continuously review its manuals and software to ensure only the highest quality of service and products. Software functionality will be tested continuously by engineers to ensure safety from hackers and viruses. Any complaints or observa

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9.

MANAGEMENT TEAM

KEY MANAGEMENT

BOARD OF DIRECTORS & BOARD OF ADVISORS

KEY MANAGEMENT

Bill Johnson
Founder and CEO - bill.j@example.com

Bill Johnson was the VP of Marketing for Sugar CRM for 5 years, helping the company grow to become a dominant player in the market before leaving to start Panda CRM. Bill's major responsibility in the company is to create the vision and direction for the company and work with the rest of the executive team to plan how this will be accomplished.

Jennifer Thomas
CMO - jenif@example.com

After 8 years of experience as a Marketing Executive at eBay, Jennifer joined the Panda CRM team in 2009 as the Chief Marketing Officer. Her major responsibilities include creating an innovative marketing strategy to meet the company's overall goals for sales and revenue.

She is also responsible for overseeing the execution of the marketing strategy by the sales and marketing teams.

Michael Russman
CFO - mich@example.com

Michael Russman has over 15 years of experience as a CFO for a variety of growing technology companies. At Panda CRM, his major responsibilities include allocating the company's resources effectively to effectively execute the company vision, with respect to the company's goals for consistent growth.

John Bryant
Founder and CTO - john@example.com

John brings wide-ranging technical expertise and experience to the Panda CRM team. From 2003--2006, John was the Lead User Interface Engineer for the CRM division at Biz Automation. John also has significant experience in heading teams specialized in both front--end and back--end engineering. At Panda CRM, John's major responsibilities as CTO include overseeing product development by the engineering team, as well as managing ongoing system improvements and repairs.

BOARD OF DIRECTORS & BOARD OF ADVISORS

The Company is currently building its Board of Directors and Board of Advisers.

10.

FINANCIAL PLAN

FINANCIAL SUMMARY

MARKETING AND PERSONNEL EXPENSES

PROJECTED PROFIT AND LOSS

PROJECTED CASH FLOW

PROJECTED BALANCE SHEET

CURRENT OWNERSHIP SUMMARY

FUNDING REQUEST & TERMS OF INVESTMENT

EXIT STRATEGY

FINANCIAL SUMMARY

Panda CRM

The Company intends to deploy its funding to maximize growth and profitability. The following chart outlines Panda CRM's projected net profit, gross revenue, and profit margins for the next five years:

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Profit and Loss
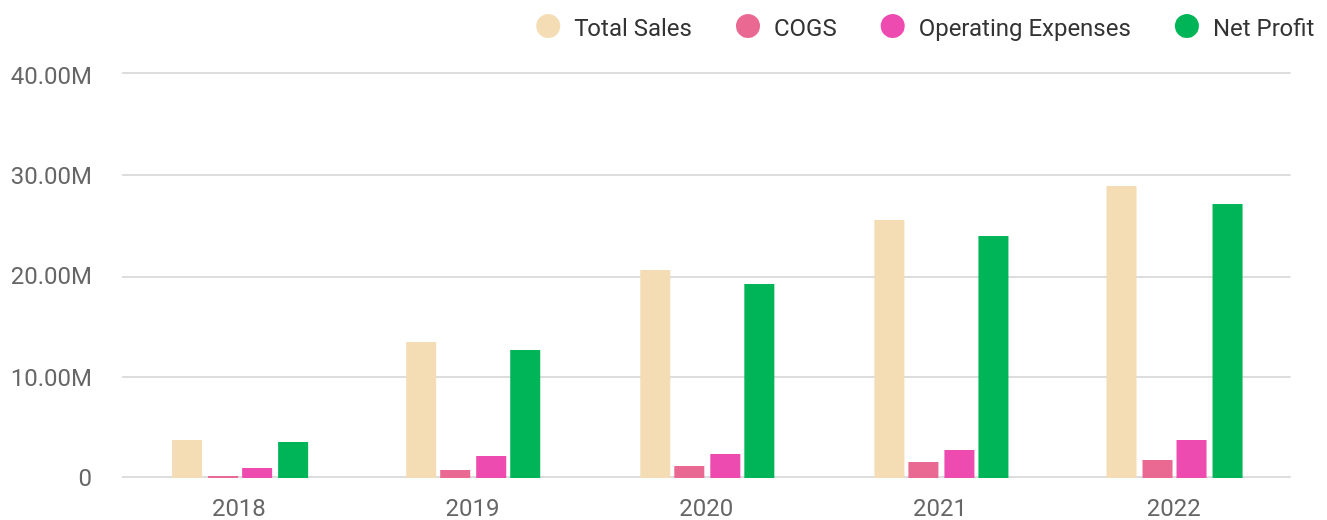
Financial Year	Total Sales	COGS	Operating Expenses	Net Profit
2018	3,782,360	255,742	1,085,858	3,526,619
2019	13,604,539	854,672	2,196,632	12,749,867
2020	20,674,652	1,278,879	2,430,785	19,395,772
2021	25,625,964	1,575,958	2,716,466	24,050,007
2022	29,097,311	1,784,239	3,859,195	27,313,072

Panda CRM

Panda CRM projects modest revenue in the first two years of operations followed by high growth in 2016 through 2018 as the Company dials in its operations and turns up sales and marketing efforts and budget. Panda CRM's revenue is divided into 3

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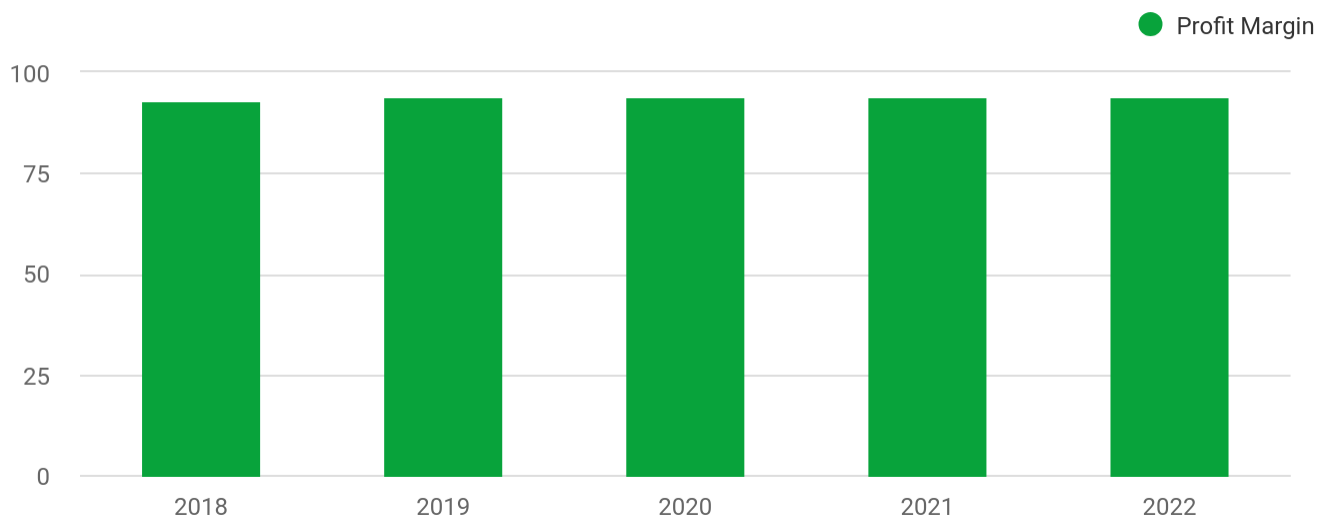
Profit Margin

Financial Year	Profit Margin
2018	93
2019	94
2020	94
2021	94
2022	94

MARKETING AND PERSONNEL EXPENSES

Based on the marketing strategies described in the sales and marketing section of this plan, the Panda CRM' marketing budget is as follows:

Marketing Budget

Legend: SEO & PPC (Google & Social Media), PR, Sponsorships, Print Ads, Seminars, TV Commercials
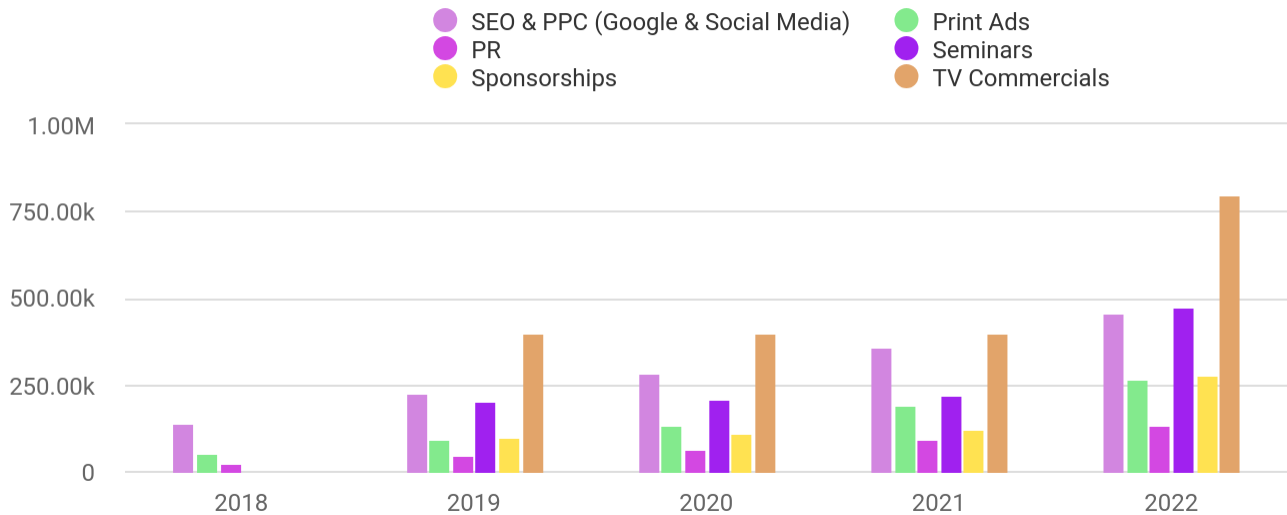
Financial Year	SEO & PPC (Go...	Print Ads	PR	Seminars	Sponsorships	TV Commercia...
2018	136,565	50,796	25,398	0	0	0
2019	224,402	92,587	46,293	200,000	100,000	400,000
2020	284,596	132,007	66,003	210,000	110,000	400,000
2021	360,936	188,210	94,105	220,500	121,000	400,000
2022	457,754	268,343	134,171	474,626	279,510	800,000

Marketing to Revenue Ratio
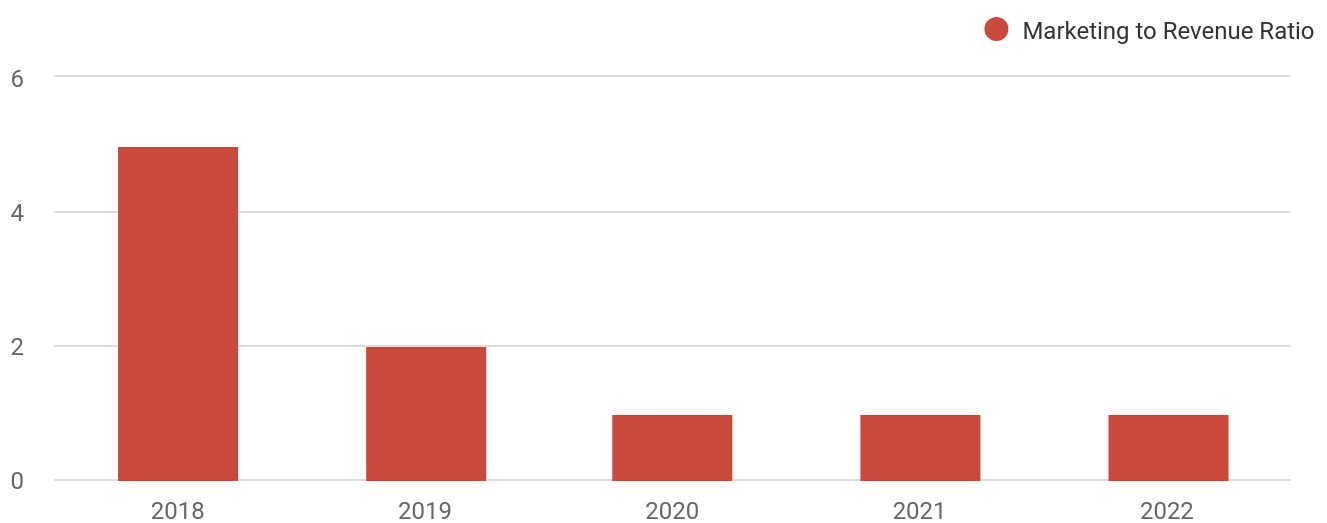
Financial Year	Marketing to Revenue Ratio
2018	5

Financial Year	Marketing to Revenue Ratio
2019	2
2020	1
2021	1
2022	1

PROJECTED PROFIT AND LOSS

	2024	2025	2026
Revenue	**$1,044,314**	**$2,398,760**	**$4,577,451**
CRM Monthly Subscription	$440,294	$1,552,680	$3,386,411
Users	1,445	3,728	7,584
Recurring Charges	$50	$50	$50
CRM Implementation Consulting	$568,020	$810,080	$1,155,040
Unit Sales	284	405	578
Unit Price	$2,000	$2,000	$2,000
Training and Support	$36,000	$36,000	$36,000
Total Hours	720	720	720
Hourly Price	$50	$50	$50
Cost Of Sales	**$193,329.45**	**$238,762.80**	**$309,163.55**
General Costs	$193,329.45	$238,762.80	$309,163.55
Direct Software Costs	$97,329.45	$137,962.80	$203,323.55
Licensing Fees	$60,000	$60,000	$60,000
Hosting Charges	$31,329.45	$71,962.80	$137,323.55
Software Maintenance Costs	$6,000	$6,000	$6,000

	2024	2025	2026
Support and Maintenance Costs	$96,000	$100,800	$105,840
Technical Support Staff Salaries	$96,000	$100,800	$105,840
Revenue Specific Costs	$0	$0	$0
Personnel Costs (Direct Labor)	$0	$0	$0
Gross Margin	**$850,984.55**	**$2,159,997.20**	**$4,268,287.45**
Gross Margin (%)	**81.49%**	**90.05%**	**93.25%**
Operating Expense	**$1,345,995.65**	**$1,388,774.93**	**$1,430,617.72**
Payroll Expense (Indirect Labor)	$1,277,736	$1,306,929.12	$1,336,815.36
Development Team	$700,320	$714,326.40	$728,613.12
Software Development Team	$460,200	$469,404	$478,792.20
Quality Assurance Engineers	$240,120	$244,922.40	$249,820.92
Sales and Marketing	$424,320	$435,494.40	$446,972.88
Sales Representatives	$268,800	$276,864	$285,169.92
Marketing Specialists	$155,520	$158,630.40	$161,802.96
Administrative Staff	$153,096	$157,108.32	$161,229.36
Office Manager	$58,056	$59,217.12	$60,401.52
Administrative Assistants	$95,040	$97,891.20	$100,827.84
General Expense	$61,762.25	$69,845.81	$81,802.36
Marketing and Advertising Expenses	$35,362.25	$42,833.81	$54,049.20
Google Ads Campaign	$25,362.25	$32,333.81	$43,024.20

	2024	2025	2026
Annual Tech Trade Show	$10,000	$10,500	$11,025
Technology and Infrastructure	$18,000	$18,360	$18,841.60
Website Maintenance	$6,000	$6,120	$6,356.80
SaaS Tool Subscriptions	$12,000	$12,240	$12,484.80
Administrative Expenses	$8,400	$8,652	$8,911.56
Office Supplies	$3,600	$3,708	$3,819.24
Utilities	$4,800	$4,944	$5,092.32
Bad Debt	$0	$0	$0
Amortization of Current Assets	$6,497.40	$12,000	$12,000
EBITDA	**($495,011.11)**	**$771,222.27**	**$2,837,669.73**
Additional Expense	**$85,734.67**	**$76,063.80**	**$65,796.41**
Long Term Depreciation	$60,000	$60,000	$60,000
Gain or loss from Sale of Assets	$0	$0	$0
EBIT	($555,011.11)	$711,222.27	$2,777,669.73
Interest Expense	$25,734.68	$16,063.78	$5,796.41
EBT	($580,745.78)	$695,158.47	$2,771,873.32
Income Tax Expense / Benefit	$0	$0	$0
Total Expense	**$1,625,059.78**	**$1,703,601.53**	**$1,805,577.68**
Net Income	**($580,745.78)**	**$695,158.47**	**$2,771,873.32**
Net Income (%)	**(55.61%)**	**28.98%**	**60.55%**

	2024	2025	2026
Retained Earning Opening	$0	($600,745.78)	$74,412.69
Owner's Distribution	$20,000	$20,000	$20,000
Retained Earning Closing	**($600,745.78)**	**$74,412.69**	**$2,826,286.01**

PROJECTED CASH FLOW

	2024	2025	2026
Cash Received	**$1,044,314**	**$2,398,760**	**$4,577,451**
Cash Paid	**$1,558,562.37**	**$1,631,601.53**	**$1,733,577.68**
COS & General Expenses	$255,091.70	$308,608.61	$390,965.91
Salary & Wages	$1,277,736	$1,306,929.12	$1,336,815.36
Interest	$25,734.68	$16,063.78	$5,796.41
Sales Tax	$0	$0	$0
Income Tax	$0	$0	$0
Net Cash From Operations	**($514,248.37)**	**$767,158.47**	**$2,843,873.32**
Assets Sell	$0	$0	$0
Assets Purchase	$212,000	$12,000	$12,000
Net Cash From Investments	**($212,000)**	**($12,000)**	**($12,000)**
Amount Received	**$1,500,000**	**$0**	**$0**
Loan Received	$500,000	$0	$0
Common Stock	$0	$0	$0
Preferred Stock	$1,000,000	$0	$0

	2024	2025	2026
Owner's Contribution	$0	$0	$0
Amount Paid	**$176,796.97**	**$186,467.84**	**$196,735.18**
Loan Capital	$156,796.96	$166,467.86	$176,735.18
Dividends & Distributions	$20,000	$20,000	$20,000
Net Cash From Financing	**$1,323,203.03**	**($186,467.84)**	**($196,735.18)**

Summary

	2024	2025	2026
Starting Cash	$0	$596,954.66	$1,165,645.29
Cash In	$2,544,314	$2,398,760	$4,577,451
Cash Out	$1,947,359.34	$1,830,069.37	$1,942,312.86
Change in Cash	$596,954.66	$568,690.63	$2,635,138.14
Ending Cash	**$596,954.66**	**$1,165,645.29**	**$3,800,783.43**

PROJECTED BALANCE SHEET

	2024	2025	2026
Assets	**$742,457.26**	**$1,251,147.89**	**$3,826,286.03**
Current Assets	**$602,457.26**	**$1,171,147.89**	**$3,806,286.03**
Cash	$596,954.66	$1,165,645.29	$3,800,783.43
Accounts Receivable	$0	$0	$0
Inventory	$0	$0	$0
Other Current Assets	$5,502.60	$5,502.60	$5,502.60
Long Term Assets	**$140,000**	**$80,000**	**$20,000**
Gross Long Term Assets	$200,000	$200,000	$200,000
Accumulated Depreciation	($60,000)	($120,000)	($180,000)

	2024	2025	2026
Liabilities & Equity	**$742,457.26**	**$1,251,147.87**	**$3,826,286.01**
Liabilities	**$343,203.04**	**$176,735.18**	**$0**
Current Liabilities	**$166,467.86**	**$176,735.18**	**$0**
Accounts Payable	$0	$0	$0
Income Tax Payable	$0	$0	$0
Sales Tax Payable	$0	$0	$0
Short Term Debt	$166,467.86	$176,735.18	$0
Long Term Liabilities	**$176,735.18**	**$0**	**$0**
Long Term Debt	$176,735.18	$0	$0
Equity	**$399,254.22**	**$1,074,412.69**	**$3,826,286.01**
Paid-in Capital	$0	$0	$0
Common Stock	$0	$0	$0
Preferred Stock	$1,000,000	$1,000,000	$1,000,000
Owner's Contribution	$0	$0	$0
Retained Earnings	($600,745.78)	$74,412.69	$2,826,286.01
Check	**$0**	**$0**	**$0**

CURRENT OWNERSHIP SUMMARY

Panda CRM is currently owned by the founders Bill Johnson and John Bryant. Bill Johnson owns 60% of the company while John Bryant owns 40% of the company.

FUNDING REQUEST & TERMS OF INVESTMENT

▭ Panda CRM

To date, Panda CRM has reached the following milestones:

- Incorporated the Company

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Current Milestones

Start writing here..

▭ Panda CRM

Panda CRM is currently seeking seed funding of $750,000. $223,000 will be spent on startup and organizational expenses such as development, rent, and office equipment, consultants, etc. The remaining $527000 will be spent on sales, marketing, personnel,

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Seed Capital

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▭ Panda CRM

The Company anticipates seeking an additional $5,000,000 at the beginning of year 2 in order to finance capital expenditures in years 2 and 3 – such as technological infrastructure, key personnel, and marketing campaigns – that will be necessary to supp

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Series A Capital
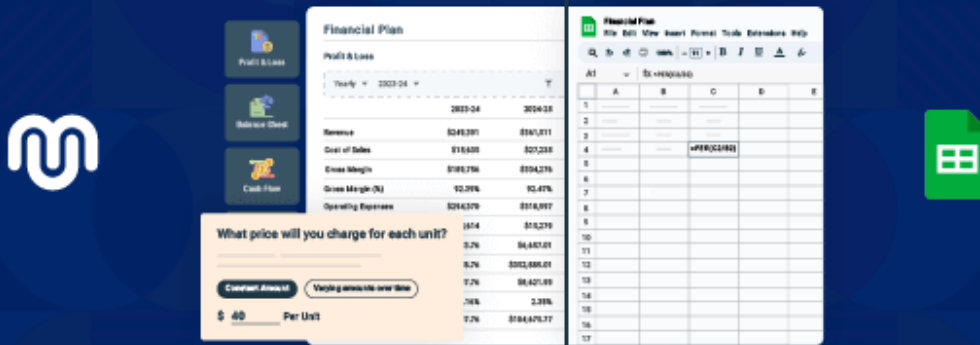
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EXIT STRATEGY

▭ Panda CRM

The tech industry is experiencing a consolidation phase with 2012 seeing 2,277 private tech companies acquired for $46.8B. The E-Marketing & Search segment increased fourfold compared to the first half of 2011 and 30 percent relative to the prior

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11.

APPENDICES

PRODUCT COMPARISON

PRODUCT COMPARISON

	Free Membership	Premium	Premium Pro	Enterprise
Features	**100 Contacts**	**1000 Contacts**	**25,000 Contacts**	**Unlimited**
	1,000 Emails	**1 GB**	**3 GB**	**10 GB**
	2 Users	**2 Users**	**3 Users**	**4+ Users**
Communications/ Networking	x	x	x	x
Send emails to team members	x	x	x	x
Private member messaging/ email	x	x	x	x
Attach a file to email messages	x	x	x	x
Attach an event to email messages	x	x	x	x
Media/File Sharing	x	x	x	x
Maximum limit	x	x	x	x
Purchase additional storage	x	x	x	x
Business Management Features	x	x	x	x
CRM	x	x	x	x
Marketing Automation	x	x	x	x
Productivity Tool	x	x	x	x
Partner Relationship Management PRM	x	x	x	x
Business Relationship Manager BRM	x	x	x	x
Contract & Documents Management	x	x	x	x
Appointment Scheduling	x	x	x	x
Assign tasks to members	x	x	x	x

Milestone/percentage tracking	x	x	x	x
Sales/fundraising reports	x	x	x	x
Email tracking	x	x	x	x
Biz Mgt & Marketing Features	x	x	x	x
Events/Calendar	x	x	x	x
Recurring events	x	x	x	x
Automatic event reminders	x	x	x	x
- Email	x		x	x
- SMS	x	x	x	x
- Auto notify subs to fill the lineup	x	x	x	x
RSVP capability (member log-in)	x	x	x	x
- via Email	x	x	x	x
- via SMS	x	x	x	x
Project deadlines integrated	x	x	x	x
Custom event types	x	x	x	x
Social media		x	x	x
- Twitter		x	x	x
- Facebook		x	x	x
- LinkedIn		x	x	x
- Searchable	x	x	x	x
FAQ	x	x	x	x
Video tutorial	x	x	x	x
Support forums	x	x	x	x
Telephone support		x	x	x

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Mariia Yevlash
★ ★ ★ ★ ★
Student, Sumy State University – Ukraine

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