

OVERVIEW

Course: **Venture**

Grade: **Middle School**

Event Format: In-Person

Activity: Partner Business Plan

Activity Description: Easy to implement and highly interactive, this activity works in-person for students to pair up and create a business plan for a new startup. Volunteers will provide guidance and feedback throughout the activity.

RUN OF SHOW

Program Element	TIME
<p>Volunteer Arrival:</p> <ul style="list-style-type: none">▪ In-person events – Volunteers are encouraged to arrive at the school at least 15 minutes prior to the event start time to allow time for visitor check-in with the main office. <p>Student Arrival</p> <ul style="list-style-type: none">▪ Students begin to arrive to their classroom	5-15 minutes
<p>Opening Remarks</p> <p>The teacher will introduce and welcome guests.</p> <p>Introduction Suggestions: <i>Below are some things you can share during your introduction:</i></p> <ul style="list-style-type: none">• General background information• How did you get started in banking?• Why do you think this course is important?• What do you do in your day-to-day role?• Show of hands, how many of you know what career you want to pursue?• Raise your hand if you know of someone who works in a bank	5 minutes

<p>Student Activity</p> <p>Build a Business Plan</p> <p>Students will apply entrepreneurial concepts by creating a business plan for a product or service, then share their ideas with the group and receive feedback from volunteers.</p> <p>Directions:</p> <ul style="list-style-type: none"> • Volunteer starts by explaining what a business plan is and why it is important when starting a business • Teacher prints and hands out the provided worksheet for students to pair up and think about starting a business together • Encourage students to be creative and ask volunteers any questions • Come back as a group and ask a few students and volunteers to present their business ideas with the class • After a few students and volunteers present their business plan, bank volunteers will provide feedback and ask questions (ex: Why did you choose this product to sell? What challenges might you face?) 	25 minutes
<p>Student Q&A</p> <p>Leave time for students to ask questions! Students can either submit questions ahead of time or we can open the floor to students to ask questions in real time. Below are a few questions you may ask the students if you have extra time -</p> <ul style="list-style-type: none"> • Have you talked about this course with friends or family? What lessons did you share? • When it comes to your future, what excites you and most worries you? • What types of jobs are you considering in your future? 	10 minutes
<p>Concluding Remarks/Farewell</p> <p>Be sure to thank the students and teachers for participating in the event.</p>	2 minutes
<p>Follow Up/ Feedback</p> <p>Please consider sending the teacher a thank you email to the teacher and invite his/her feedback by completing a quick post-event survey.</p>	

Helpful Tips:

- Make sure you leave time at the end of your visit for students to ask you questions about your job and personal finance – students love hearing from local experts.

- You can also bring a prize for the students. This is completely at your discretion and can be anything from branded swag to school supplies to a choice of snacks or food. If you plan on bringing snacks or food, be sure to check with the teacher to adhere to the school's policy and be mindful of student allergies.

Packing List:

- Business plan worksheet (provided)
- Prizes (if applicable)
- Thank you note for the teacher (optional)
- Camera (or phone)

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Sample Talk Track for Business Plan Discussion

1. Introduction (2-3 minutes)
 - Hi everyone! My name is [your name], and I'm excited to be here today representing [bank division]. Thank you for having me!
 - At [bank division name], we work with businesses of all sizes, helping them plan for success. One of the most important things we see in successful business is a solid business plan – which is exactly what we're here to talk about today.
2. Why a Business Plan Matters (3-5 minutes)
 - Think about your favorite business – maybe a clothing store, electronic store, or even a restaurant. Have you ever wondered how they got started?
 - Every business begins with a plan. Think of a business plan like a roadmap – it helps business owners know where they're going and how to get there.
 - Without having a plan, businesses can struggle with important areas like managing money, understanding customers, and growing their business.
3. Key Parts of a Business Plan (5-7 minutes)
 - A strong business plan includes:
 - Your business idea – *What are you selling? Who are your customers?*
 - Budget & Costs – *How much will it cost to start? How will you make a profit?*
 - Marketing Strategy – *How will people find out about your business?*
 - Goals & Growth – *Where do you see your business in one year? How about five years?*
4. Example
 - Let's talk about an example. Imagine you want to start a food truck selling smoothies. Without a plan, you might not know how much fruit to buy, where to park the truck, or how to promote your new business and let people know you are open. With a solid business plan, you can figure out your costs, set goals, and grow your business.
5. Interactive Activity
 - Now that we know why a business plan matters and what is included in a plan, let's create our own! Think about a business you'd like to start. What would you sell? Who will your customers be? How will you tell people about your business?

Use the provided worksheet for students to create their own plan

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Business Plan Creation *Example*

Names:

Business Name:

Smoothies on the Go

Product/Service: *(what are you selling?)*

A mobile smoothie truck offering fresh, healthy smoothies made with real fruit and customizable add-ins like protein powder.

Target Audience: *(who will your customers be?)*

Busy people looking for a quick snack or a nutritious breakfast
High schoolers and college students who want a healthier option
People leaving the gym who need a post-workout snack

Price? *(what will you charge?)*

Small smoothie: \$6

Medium Smoothie: \$7.50

Large Smoothie: \$9

Add-ins (protein, chia seeds, extra fruit): +\$1/each

How will you promote your business? Why?

We will use social media like Instagram and TikTok to show the smoothie making process and customer testimonials. We will partner with local gyms and yoga studios for a post-workout smoothie deal. Also, we can offer a loyalty punch card system for repeat customers and get a free smoothie after they have purchased nine smoothies. These ideas will spread the word by social media and word of mouth.

Now, it's your turn to create a business plan!

Business Plan Creation

Names:

Business Name:

Product/Service: *(what are you selling?)*

Target Audience: *(who will your customers be?)*

Price? *(what will you charge?)*

How will you promote your business? Why?