

Small Business Operational Plan

Organize your business goals, tasks, KPIs, budgets, and milestones with this editable Small Business Operational Plan Template. Designed for small business owners and startup teams, it provides a clean, practical layout to help plan responsibilities, track progress, and keep operations aligned quarter after quarter.

Goal Setting

Define clear, measurable objectives

KPI Tracking

Monitor metrics and progress



Responsibility

Assign owners for each task

Operations

Manage workflows in one place

i MarcusWells.info helps small business owners identify their highest-priority leaks, rank what needs to be fixed first, and build a clear 30-day repair plan.

Next Step: **👉** Schedule a Strategy Call at: www.MarcusWells.info

Overview

Complete the fields below to establish the foundational context for this operational plan.

Field	Value	Field	Value
Plan Title			
Department / Team			
Plan Duration		Prepared By	
Last Updated		Plan Review Schedule	
Business Name		Primary Goal	
Key Focus Area		Review Date	

KPIs & Metrics

Track key performance indicators — set baselines, define targets, and establish review cadence.

KPI / Metric	Current Result	Target Result	Tracking Method	Review Date	Notes
Monthly Revenue					
Customer Retention Rate					
Lead Conversion Rate					
Average Order Value					
On-Time Delivery Rate					
Customer Satisfaction Score					

Communication & Reporting

Define the cadence and structure of team communications, reporting meetings, and review sessions.

Report / Meeting	Purpose	Owner	Frequency	Audience	Notes
Weekly Team Meeting			Weekly		
Monthly KPI Review			Monthly		
Quarterly Planning Meeting			Quarterly		
Budget Review					
Customer Feedback Review					

Resources & Budget

Document all resources and expenses — track budgeted vs. actual spend and calculate variance.

Resource / Expense	Category	Budgeted Amount	Actual Amount	Owner	Notes

Total Budget	Total Actual	Variance	Notes

Review & Continuous Improvement

Use this section at the end of each review period to reflect on performance and plan improvements.

Review Question	Notes / Response
What worked well this period?	
What needs improvement?	
What should be adjusted next quarter?	
What risks or obstacles need attention?	
What action items should be carried forward?	

