



**MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE  
SIMON KUZNETS KHARKIV NATIONAL UNIVERSITY OF ECONOMICS**



**BUSINESS PLANNING**  
**syllabus of the educational discipline**

Field of knowledge	<b>07 “Management and Administration”</b>
Specialty	<b>073 “Management”</b>
Level of education	<b>first (bachelor)</b>
Educational program	<b>Business administration</b>

Discipline status	<b>selective</b>
Language of instruction, teaching and assessment	<b>English</b>

Head  
of Management and Business Department

Tetyana LEPEYKO

APPROVED

at the meeting of the *Management and Business department*

Protocol № 1 of August 29, 2022.

Compiled by:

A. Kotlyk, PhD, Associate professor of Management and Business department,

O. Krasnonosova, DSc in Economics, professor of Management and Business department,

O. Kanova, PhD, Associate professor of Management and Business department

**Sheet of renewal and re-approval  
of the academic discipline syllabus**

Academic year	Date of the department meeting – developer of syllabus of the academic discipline	Protocol number	Sign of Head of the department

## Abstract of the educational discipline

Modern processes of globalization and the development of communication technologies create many opportunities for the implementation of the most daring business ideas on a global scale. But statistics shows that most of these ideas, even very promising, remain on paper, or attempts to implement them often fail. This is due to the inability of entrepreneurs to correctly formulate and present the idea of their business, to find sources of its financing, to plan and organize the implementation of its business idea, taking into account the most critical requirements and risks.

It should be understood that these tasks are not trivial. First of all, not every idea can be suitable for further commercial implementation. Second, when creating a new company to implement the startup of the project, there are a number of factors that should be taken into account. Thirdly, in conditions of fierce competition, even understanding the factors that affect the success of the startup of the project does not guarantee its successful implementation, and sometimes it is not effective even for large and successful corporations. So, one of the main reasons for the emergence, successful development and the continued existence of startups is the slowness and slowness of large corporations that successfully use existing products, and the development and creation of new ones are not nearly done. Therefore, startups, thanks to their mobility in terms of implementing new ideas, compete with large corporations.

Consequently, professionals who plan to start their own business in the future or participate in corporate business development projects need to acquire key knowledge and skills in business planning.

Purpose of the academic discipline “Business Planning” is to form a system of theoretical knowledge and applied skills in developing a business plan.

The tasks of the academic discipline are:

to learn the essence of planning and business planning;

to distinguish the features of different types of investment projects: startup, scale up, improvement;

to master the technique of development a Business Model Canvas;

to master key techniques of market analysis;

to master the technology of a business plan development;

to master the technology of developing a financial model for a business plan;

to learn the main principles and to master the technology of business plan pitching.

The subject of the academic discipline is a set of principles, approaches and methods of developing a business plan of an investment project.

## Characteristics of the educational discipline

Course	<b>4</b>
Semester	<b>7</b>
Quantity of credits ECTS	<b>5</b>
Final control	<b>Exam</b>

## Structural and logical scheme of studying the discipline

<b>Prerequisites</b>	<b>Postrequisites</b>
Management	Project management
Informatics	Bachelor thesis
Marketing	

### Competence and learning outcomes of the discipline

Competence	Learning outcomes
Ability for abstract thinking, analysis, synthesis.	Demonstrate skills in the analysis and synthesis of information, adapting them to analyze and solve problems in various areas of business and management
Ability to apply knowledge in practical situations.	Demonstrate knowledge of theories, methods and functions of management, modern concepts of leadership.
Knowledge and understanding of the subject area and understanding of professional activity.	Demonstrate skills in problem identification and justification of management decisions.
Skills in using information and communication technologies.	Assess opportunities for using technology to optimize business performance
Ability to conduct research at an appropriate level.	Demonstrate the skills of searching, collecting and analyzing information, calculating indicators to substantiate management decisions.
Ability to generate new ideas (creativity).	Demonstrate skills in situation analysis and communication in various areas of the organization.
Ability to identify and describe organizational characteristics.	Demonstrate organizational design skills.
The ability to determine the prospects of the organization's development.	Demonstrate the skills of searching, collecting and analyzing information, calculating indicators to substantiate management decisions.
The ability to determine the functional areas of the organization and the connections between them.	Coordinate aspects of business organizations that contribute to the effectiveness of its work
Ability to plan the activities of the organization and manage time.	Assess the legal, social and economic consequences of the organization's functioning.
Ability to work in a team and establish interpersonal interaction when solving professional tasks.	Demonstrate the skills of interaction, leadership, teamwork.
The ability to apply theoretical-methodical and organizational-economic approaches to the process of development, adoption and implementation of management decisions in conditions of uncertainty and to form a complex of the most influential risks.	Demonstrate communication, research, technological and cross-cultural skills necessary to analyze business situations, prepare, justify and present management decisions
The ability to use primary information processing methods regarding the economic foundations of the organization's functioning to form a system of the most urgent tasks.	

## Syllabus of the educational discipline

### Content module 1. Idea development and market analysis

#### Topic 1. The concept of a business plan

The concept of a business plan. Purpose of business planning. Types of business plans. Structure of a business plan.

Project. Investment project. Stages of investment project development.

Startup. Stages of startup. Reasons for startup failure. Startup ecosystem.

Business idea. Approaches to develop the business idea.

Business Model Canvas. Planning horizon.

Characteristics of the product (service) of the project and its comparative advantages over analogues

#### Topic 2. Analysis of the market

Scope for market analysis. Determining the market size and market price.

Consumer profile. Questionnaire. Factors impacting demand. Legislative regulation of the market. Competitive analysis. Market infrastructure

#### Topic 3. Marketing plan

Selecting a target segment. Marketing strategy. Competitive advantages of the product (service) of the project. Sales forecast. Marketing mix. Marketing budget.

### Content module 2. Operational and financial planning

#### Topic 4. Operational plan

Operational technology. Determination of the need for premises, equipment, transport. Determination of the need for components, materials, energy, characteristics and contact details of suppliers, availability of contracts.

#### Topic 5. Organizational plan

Organizational and legal form of project implementation. Taxation and accounting system. Schedule for project implementation at pre-operational phase (startup).

Assessment of the ability of management to lead the project.

Selecting a mode of operation. Organizational structure and staffing of the project.

Project team motivation. Staff requirements, job descriptions. Personnel recruitment and training plan

#### Topic 6. Financial plan

Determination of sources, conditions and developing the project financing schedule.

Calculation of costs, revenue and investments. Calculation of project performance indicators.

#### Topic 7. Risk management

Analysis of the sensitivity of the project. Risk mitigation

#### Topic 8. Business plan pitching

Executive summary of the project. Business plan formatting. Business plan pitching.

The list of laboratory classes, as well as questions and tasks for independent training is given in the table "Rating-plan of the discipline".

### Teaching and learning methods

Achieving the expected learning outcomes is facilitated by the use of the following teaching and learning methods: discussions (topic 1 – 3, 5), modeling of the business situations (topics 1 –

7); presentations (topics 1, 2, 6 – 8); case method (topics 1 – 7), set of individual competency-oriented works (topic 6), work in teams (all topics), research-based teaching (topics 2, 4, 6, 7).

### **Assessment system of learning outcomes**

The system of assessment of the developed competencies takes into account the types of lessons, which, according to the syllabus, includes lectures, labs and independent training. Assessment of the developed competencies is carried out using a 100-point accumulation system.

Control measures includes current control during lectures, laboratory classes and individual tasks and is estimated by the amount of points scored (maximum score – 60 points, minimum score that allows the student to pass exam – 35 points) and final/semester control – is conducted in the form of a exam in accordance with the schedule of the educational process (maximum 40 points).

**Current control includes** assessment of applicant knowledge in the following forms and according to the following criteria:

competence-oriented task on topic – the ability to combine theory with practice when considering situations; logic, structure, style of presentation of the material when performing in the audience, the ability to justify their position (maximum score – 5 points);

written test – understanding the theoretical material, degree of mastering the theory and methodology of the problems under consideration; the degree of mastering the actual material of the discipline; ability to combine theory with practice in the process of considering problem situations, problem solving (maximum score that an applicant can receive – 10 points);

presentation of individual task – depth and strength of knowledge, level of thinking, ability to systematize knowledge on individual topics, ability to draw sound conclusions, mastery of categorical apparatus, ability to find necessary information, systematize and process it; ability to conduct critical and independent assessment of certain problematic issues (maximum score: 5, 10, 15 and 15 points for 4 presentations respectively).

The maximum possible score for a specific task is set provided that the individual task of the applicant or his oral response to all these criteria. The absence of one or another component reduces the number of points. During the evaluation of laboratory work, attention is also paid to the quality, independence and timeliness of delivery of completed tasks to the teacher, according to the schedule of the educational process. If any of the requirements are not met, the points will be reduced.

**Final control** is represented in the form of exam and covers all topics of the educational discipline. The structure of the exam card is as follows:

- 1) 10 tests (maximum score – 10 points);
- 2) 2 diagnostic practical task/problem situations (maximum score – 15 points each, in total – 30 points).

The maximum score on exam is 40 points.

### **Independent training includes:**

- 1) study of theoretical material from the previous lecture before each further lecture;
- 2) collection, generalization, processing of information necessary for active work in practical classes and performing the individual scientific research task.

The total score in the points for the semester is: 60 or more points – the discipline is passed successfully, 59 or less points – the discipline is not passed.

Forms of assessment and distribution of points are given in the table "Rating plan of the educational discipline".

### Rating plan of the educational discipline

Topic	Forms and types of learning	Forms of assessment	Max points
<b>Content module 1. Idea development and market analysis</b>			
<b>Topic 1</b>	<i>Classroom work</i>		
	Lectures 1 – 4 on the concept of a business plan, structure of a business plan, investment project, startup, Business Model Canvas.	Active work on lecture	-
	Teambuilding game Development and presentation of business ideas Development and presentation of Business Model Canvas	Presentation Presentation	5 10
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic Preparation for presentation	Homework checking	-
<b>Topic 2</b>	<i>Classroom work</i>		
	Lectures 5 – 7 on analysis of the market	Active work on lecture	-
	Performing the competencies-oriented task on developing the financial model Presentation of questionnaire	Presentation	15
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic Completing the laboratory task Preparation for presentation	Homework checking	-
<b>Topic 3</b>	<i>Classroom work</i>		
	Lecture 8 on marketing plan development	Active work on lecture	-
	Performing the competencies-oriented task on developing the financial model	Active participation in performing tasks	-
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic Completing the laboratory task	Homework checking	-
<b>Content module 2. Operational and financial planning</b>			
<b>Topic 4</b>	<i>Classroom work</i>		
	Lecture 9 (part 1) on operational plan development	Active work on lecture	-
	Performing the competencies-oriented task on developing the financial model	Active participation in performing tasks	-
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic Completing the laboratory task	Homework checking	-



<b>Topic 5</b>	<i>Classroom work</i>		
	Lecture 9 (part 2) on organizational plan development	Active work on lecture	-
	Performing the competencies-oriented task on developing the financial model	Active participation in performing tasks	-
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic Completing the laboratory task	Homework checking	-
<b>Topic 6</b>	<i>Classroom work</i>		
	Lecture 10 on financial plan development	Active work on lecture	-
	Performing the competencies-oriented task on developing the business plan	Active participation in performing tasks	-
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic	Homework checking	-
<b>Topic 7</b>	<i>Classroom work</i>		
	Lecture 11 on risk management in business planning	Active work on lecture	-
	Performing the competencies-oriented task on developing the business plan	Active participation in performing tasks	-
		Written test	10
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic	Homework checking	-
<b>Topic 8</b>	<i>Classroom work</i>		
	Discussion on technologies of business process improvement	Active work on lecture	-
	Performing the competencies-oriented task on developing the business plan	Active participation in performing tasks	5
	<i>Independent training</i>		
	Search, selection and review of literary sources on a given topic Preparation for presentation	Presentation	15
Final control		Exam	40

### Recommended references

#### Main

1. Kotlyk A. Business planning. Summary of lectures. – Access mode: <https://pns.hneu.edu.ua/course/view.php?id=9156>.

2. Reilly D. Business plan guide. – Fall River, Massachusetts: Massachusetts small business development center network. – Access mode: [https://drive.google.com/file/d/1xV\\_rY5YbIVa\\_P4S07mqRUMAKj0m5CZ0F/view](https://drive.google.com/file/d/1xV_rY5YbIVa_P4S07mqRUMAKj0m5CZ0F/view).

3. Dewhurst J. An Introduction to Business and Business Planning: Introducing Business through the Development of a Business Plan. – Access mode: <http://thuvienso.bvu.edu.vn/bitstream/TVDHBRVT/15850/1/An-Introduction-to-Business-and-Business-Planning.pdf>.

4. Handbook of Business Planning: The tools you need to profitably build your business and make a difference! – Access mode: <https://www.businesspowertools.com/download/Handbook%20of%20Business%20Planning.pdf>.

#### **Additional**

5. Гринева В. Н. Бизнес-план производственного предприятия: комплексная технология разработки: учеб. пособие / В. Н. Гринева. – Х. : ИНЖЭК, 2007. – 119 с.

6. Harnish V. Mastering the Rockefeller Habits: What You Must Do to Increase the Value of Your Growing Firm. – Boston, MA: Gazelles, Inc., 2002. – 176 p.

#### **Information resources**

7. Kotlyk A. Business planning [Electronic resource] // Website of PNS of S. Kuznets KhNUE. – Access mode: <https://pns.hneu.edu.ua/course/view.php?id=9156>.

8. <https://www.inc.com/startup> – website about startups.

9. [www.management.com.ua](http://www.management.com.ua) – Management: methodology and practice. Ukrainian electronic journal.

10. <http://www.yepworld.org/en/> – website of YEP! Starter startup incubator.

11. [https://www.facebook.com/startupkhnue/?ref=py\\_c](https://www.facebook.com/startupkhnue/?ref=py_c) – Facebook page of startup center First Capital.