

Company Name BUSINESS PLAN  
Current Month, Year

Name  
Title

CONFIDENTIAL

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*A plan is an important part of any business, whether you are starting up or if you are an established business. A plan gives you the opportunity to reflect on your business and the reasons why you want to be a business owner. A plan explains: who (is the business), what (does it provide), when (time, dates, etc.), where (market, location, etc.), why (you are in the business), how (do you provide your products/services) and how much (revenue do you bring (or will bring) and how much investment do you need.*

*Each title represents a section. In order to present the best case, write as much information as you can for each section.*

# I. Introduction

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*Describe who you are, your business name, and how much funding you need along with what the funding will do to grow your business.*

## **Key Questions to Answer:**

- What does your business do?
- What market need does your business solve?
- What are the 4-7 reasons to your business to be successful?
- How much capital, if any, are you seeking for your business? What are you going to use the capital for?

## II. Business Description

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### Company Profile

- What is the name of your business? Do you have a logo, mission, vision, tagline?
- What date was the business established?
- Where are you located? Please provide the exact address.
- What is your legal entity form?

### Company Mission/Vision Statement

- What does your company do?
- What goals is your company trying to achieve?

### Company Timeline

- **Company History** for ongoing companies
- **Start-Up Plan** for new companies

## III. Management and Operations

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### Management Team Members

- Who are the owners?
- Who manages/will manage the business?
- Include the resume(s) of each member of key staff.

### Staff Analysis

- Who do you still need to hire?

### Advisory Committee

- Do you have an Advisory committee? Who would be a good mentor for business?

### Operations

- What are the days/times and locations you are open? Are there any other sales opportunities (website etc.)?

## IV. Products and Services

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### Products/Services

- Please list your products and services (attach your menu, brochure etc.).
- Please include the price for each product/service.
- Provide information or packages that will help determine the cost of goods or services sold.

# V. Industry and Competition

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## Market Need

- What customer need(s) are you fulfilling?

## Market Fundamentals

### *Industry/Market Overview*

- In what industry do you compete?
- Describe what market your business serves?

### *Market/Industry Trends*

- What are the key market trend(s) and how does that affect you?

### *Relevant Market Size*

- How large is your target market (the # of customers who can realistically buy from you)?

## Competitive Analysis

- Who are your direct competitors? Please include the name of the business, location, products/services they sell and the price range. See Section VII for example.
- What are their strengths and weaknesses?

## Competitive Advantage

- What are your competitive advantages?
- How are you different/better?
- Based on your industry competition, describe how your business uniquely qualified to succeed?

## VI. Customers

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### Type(s) of Customer

- Does your business serve business clients, consumers, government? Or all of the above?

### Customer Profile

- What does your ideal/potential customer look like (Create a profile of who your business services including lifestyle, disposable income, education etc.)
- Do you see any trends within your consumer base?



## VII. Marketing and Sales Strategy

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### Strategy

- How do/will you promote your products/services to create sales?
- What type of advertising/marketing strategies are you using?
- How much do/will you spend on marketing and sales?

### Branding

- Based on your customer profile, how is/will your brand related to your customer?

## VIII. Financial Plan

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### Financial Situation (Personal and Business)

If you are a **startup** please provide information about your personal financials. This includes your monthly expenses and income (all of them). List all your bank accounts and include your personal tax return information.

If you are an **established** business, provide the same above and your business financials. This includes all monthly expenses and income (all of them). List all your bank accounts and include the business tax return information.

- Based on the monthly statements, please answer the following:
  - a. What are your past and current sales? What is your projected monthly revenue?
  - b. What are your past fixed and variable costs? What are you projected monthly expenses?
- For the financials remember you are building a case. Please include three months of financials. Use the following templates:
  - a. Business budget (P&L also known as a Cash Flow statement)
  - b. Household Budget
  - c. Project expense list

### Funding Requirements/Use of Funds

- How much money do you need to start and/or run your business? What are the primary uses of these funds?

# IX. Appendix

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The Appendix is used to support the rest of the business plan.

Include the following (if applicable) in the Appendix:

- Projected Income Statements, Balance Sheets and Cash Flow Statements
- Key Staff Resumes
- Customer Lists
- Product/Service Details
- Partnership and/or Customer Letters
- Expanded Competitor Reviews

## Expanded Competitor Reviews

This chart is a great tool when you are analyzing your competition. It clearly states the name, location, products/services and price range of each business.

EXAMPLE: Competition Table			
Business	Location	Products / Services	Price Range
<i>Name of your competitor</i>	<i>Include full address</i>	<i>List the products and services the business offers</i>	<i>List price ranges for the products and services offered</i>