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BUSINESS PLAN

BUSINESS NAME | OWNER(S) | PLAN DATE

Street address | Phone

City, state, ZIP | Email / website

1. Executive summary

MISSION STATEMENT (ONE OR TWO SENTENCES)

WHAT THE BUSINESS DOES, WHO IT SERVES AND WHERE

WHY IT WILL SUCCEED (EXPERIENCE, DEMAND, WHAT SETS YOU APART)

Funding requested | Main use of the funds

Year 1 sales goal | Expected to break even

2. Company description

Legal structure | Started / opening date

Location(s) | Employees now / year 1

THE PROBLEM YOU SOLVE AND HOW YOU SOLVE IT

COMPETITIVE ADVANTAGES

BUSINESS PLAN: MARKET AND TEAM

3. Market analysis

INDUSTRY OUTLOOK AND TRENDS

TARGET CUSTOMERS: WHO THEY ARE, WHERE, HOW MANY, WHAT THEY SPEND

Competitors

Competitor	What they do well	Where they fall short	Price range

HOW YOU WILL WIN CUSTOMERS FROM THEM

4. Organization and management

Name	Role	Experience and skills	Ownership %
Total ownership			

ADVISERS (ACCOUNTANT, ATTORNEY, BANKER, MENTOR) AND HIRING PLANS

BUSINESS PLAN: PRODUCTS, MARKETING

5. Service or product line

Product or service	What it is and why customers buy it	Price	Cost to deliver	Margin %

PATENTS, TRADEMARKS, LICENSES, OR PRODUCTS AND SERVICES IN DEVELOPMENT

6. Marketing and sales

Channel	What you will do	Monthly budget	New customers / mo
Total per month			

Marketing cost per new customer	

SALES PROCESS, FROM FIRST CONTACT TO PAYMENT

KEEPING CUSTOMERS (SERVICE, FOLLOW-UP, LOYALTY, REFERRALS)

BUSINESS PLAN: FUNDING, FINANCIALS

7. Funding request

Amount requested _____ Type (loan, credit line, equity) _____

Term / repayment wanted _____ Owners' own investment _____

Use of funds

Use	Details (quotes, suppliers, timing)	Amount
Total		

FUNDING YOU MAY NEED OVER THE NEXT FIVE YEARS

8. Financial projections

Year	Sales	Cost of sales	Gross profit	Operating expenses	Net profit	Net margin %
Year 1						
Year 2						
Year 3						
Year 4						
Year 5						

Before income tax. Attach income statements, balance sheets and cash flow statements, with year 1 by month or quarter.

KEY ASSUMPTIONS BEHIND THE PROJECTIONS (PRICES, VOLUMES, HIRING, GROWTH)

9. Appendix: documents attached

- ❑ Owner and manager résumés
- ❑ Credit history (personal, business)
- ❑ Licenses and permits
- ❑ Lease or letter of intent
- ❑ Contracts and supplier quotes
- ❑ Letters of reference
- ❑ Product photos or menu
- ❑ Detailed financial statements
- ❑ Market research data