

**BUSINESS  
PLAN  
TEMPLATE**

This business plan template will guide you in creating your business plan. Once you've filled in the appropriate information, remember to thoroughly proofread it so that it is free from spelling and grammatical errors.

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# ***BUSINESS PLAN***

[Date]

Company name  
Street address 1  
Street address 2  
City, state, ZIP  
Business phone  
Website URL  
Email address

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# EXECUTIVE SUMMARY

**Mission Statement:** A brief statement of what your business seeks to accomplish

**Company Information:** Founding date, names/roles of founders, number of employees, number of locations

**Company Highlights:** Growth highlights of the company (financial or other), along with hard numbers and charts

**Product/Service:** Short description of what you sell and who you sell to

**Financial Information:** Financing goals and any current sources of funding

**Future Plans:** Quick glimpse of where you're headed (expansion, new products)

# COMPANY DESCRIPTION

**Industry:** A quick description of the industry you're in

**Target Market:** Your primary customer base

**Competitive Advantages:** Describe any competitive advantages you may have, such as expertise or location.

# MARKET ANALYSIS

**Industry Information:** Size of industry, past growth, projected future growth, current trends

**Competitors:** Top competitors, strengths and weaknesses, total market share

**Target Market:** Specific customers you are targeting (current needs and existing solutions, demographic information)

**Target Market Size:** Amount target market spends, frequency and timing of purchases

**Market Share Potential:** Amount of market share you believe you can acquire

**Barriers To Entry:** Things that would make it difficult to succeed, such as strict regulations or high tech costs

# ORGANIZATION AND MANAGEMENT

**Key Stakeholders:** Who are the key stakeholders in the business and how do they relate to one another (include organizational chart)?

**Legal Structure:** Describe whether your company is an LLC, S-Corp, C-Corp, or other legal entity.

**Employee Background:** Background information about key stakeholders that demonstrates expertise/value

**Key Hires:** List any key hires that you will need to make in order to succeed

# PRODUCTS AND SERVICES

**Description of Product/Service:** A clear description of what your product/service is

**Benefits:** A thorough description of how your product benefits customers and stands apart from the competition

**Pricing Structure:** Explanation of how you will price your product

**Proprietary Information:** Any intellectual property, patents, or proprietary information you possess that will contribute to your success

**Supply Chain:** Suppliers/vendors you rely upon, along with key information like how often you receive supplies and the method by which you receive them



# MARKETING AND SALES

**Positioning:** How you will position yourself relative to your competitors (lower cost, superior quality, superior service)

**Promotional Methods:** Specific tactics you'll use to spread the word about your product or service

**Success Metrics:** How you will evaluate the results of your marketing efforts

**Sales Strategy:** Method(s) you will use to sell to customers (cold calling, in-person meetings, other strategies)

**Sales Team:** Description of who will be selling to customers

**Budget:** Amount of money to be spent on marketing and sales efforts

# FINANCIAL PROJECTIONS

**Current Financial Status:** Income statements, balance sheets, cash flow statements, debt documentation, and other pertinent details

**12-Month Financial Projection:** Projected sales, cost of goods sold, profit, expenses, net operating income

**Cash Flow Projection:** Projection of how much cash you'll have on hand at given points over the next 12 months

**Projected Balance Sheet:** Projected balance sheet in 12 months

**Break-even Calculation:** Projection of how much sales volume you'll need to cover costs

# FUNDING REQUEST

**Request Details:** Type of funding you are requesting along with the amount of funding and terms

**Use of Funds:** How you will be using the funding (inventory, payroll, other)

**Future Plans:** How and when you will repay the investment, any plans to sell the business

# APPENDIX

**Table Of Contents:** Make it easy to connect information in the appendix to specific sections of the business plan.

**Supporting Information:** Key information that supports previous sections