

Name of Business
Address
Phone
Website

Who wrote the plan
Date

Business Plan Outline

I. Executive Summary

(This section is written last)

Write a brief description of the business including the Mission, Main competition, Overview of Market Analysis, Organizational Structure, Management Structure, Short and long term goals and feasibility of business.

II. Business Description, Mission Statement and Goals:

General Description of the Business:

MISSION: Write a Mission Statement that guides your work.

GOALS: List the short and long term goals with measurable objectives. These goals are when you are *in* business.

SHORT TERM GOAL 1:

OBJECTIVE A:

OBJECTIVE B:

OBJECTIVE C:

SHORT TERM GOAL 2:

OBJECTIVE A:

OBJECTIVE B:

OBJECTIVE C:

SHORT TERM GOAL 3:

OBJECTIVE A:

OBJECTIVE B:

OBJECTIVE C:

LONG TERM GOAL 4:

OBJECTIVE A:

OBJECTIVE B:

OBJECTIVE C:

III. Background Information

INDUSTRY OVERVIEW

Provide background information on the Industry

- ◆ Describe current and future industry trends.

Provide information on business fit

- ◆ Describe how this business fits into the industry.

IV. The Marketing Plan

- ◆ Describe the products or services by features, Services:
- ◆ Features:
- ◆ Benefits to the customer
- ◆ Seasonality:
- ◆ Growth potential
- ◆ Provide an analysis of the market by describing the customer's demographics
- ◆ Competitor's strengths and weaknesses
- ◆ Market potential within the current trade area including target market size and trends.
- ◆ Describe the Marketing strategy for the business location,
- ◆ Price/quality relationship
- ◆ Promotional strategies
- ◆ Packaging plan including business cards, flyers, advertisements, and labels.

V. Operating Controls

- ◆ Legal Identity description
- ◆ Describe Cash Management procedures such as cash or accrual basis tracking accounts receivables, and accounts payables. Describe who will be responsible for handling sales receipts, reconciliation of bank accounts and petty cash.
- ◆ Describe person responsible and internal management procedures related to purchasing, inventory control, customer service, pricing, and quality control.
- ◆ Describe person responsible and procedures for managing customer service.
- ◆ Describe how pricing will be determined competitively, cost per unit and how changes will be modified.
- ◆ Describe the quality control procedures.
- ◆ Who is on you're Advisory Team
Attorney, CPA, Insurance Agent, Business Consultant, Other

VI. The Financial Plan

- ◆ Create a cost analysis that includes cost of goods/services, overhead, wages, outside consulting, insurance, advertising, sales forecasts, rent, product/supply expenses, start-up/expansion costs and fixed assets.
- ◆ Project an analysis for First 12-Months, First, Second & Third Years Income/Expense Projections, Balance Sheet and Statement of Owners Equity with assumptions as footnotes.

- ◆ Monthly Cash flow projection for Year one and two with assumptions as footnotes.
- ◆ Determine existing debt, personal financials and financial need.

VII. Environmental Sustainability

- ◆ Determine how your business impacts the environment and society by considering the community, local-ness of materials and supplies, social capital, transportation, energy, toxins, water, air quality, and marketing.
- ◆ Explain specific ways you will improve the impact of your business.

VIII. Feasibility Action Statement

- ◆ Describe and prioritize the actions needed to move forward to implement the plan. This describes each task before you start the business or new project.

IX. Supporting Documents

- ◆ Resumes of key people
- ◆ Personal Financial Statements
- ◆ Photographs of product, equipment, marketing materials
- ◆ Market survey results