
Business Plan For:

name of your business

Completed:

date the business plan was completed

Organization

The business, named _____, and
name of your business

located at _____ is in the following phase:
address of your business

(check one only) _____ start-up ; _____ initial operations; _____ expansion; _____ stable operations. The type of business

is: (check one or more) _____ retail; _____ service; _____ distribution/wholesale; _____ manufacturing/production. The

business is organized as a: _____
Sole prop., Gen. Partner., Limited Partner., C Corp., S Corp., Limited Liab. Co., Limited Liab. Part., Coop., Non-Profit Assoc., Non-Profit Corp.

and has been in business since _____ or will open _____.
date the business was formed/founded start date for business

The business is dedicated to (write a mission statement or a brief description of the nature of the business):

The business is owned by (name the owners and give a brief description of their skills/management experience):

Owner #1 _____
name of owner

description of skills/management experience

Owner #2 _____
name of owner

description of skills/management experience

Owner #3 _____
name of owner

description of skills/management experience

The business employs/will employ the following key employees/advisors: (name the top 3 employees or advisors):

Employee/Advisor #1 _____
name of employee/advisor

description of skills/management experience

Employee/Advisor #2 _____
name of employee/advisor

description of skills/management experience

Employee/Advisor #3 _____
name of employee/advisor

description of skills/management experience

Currently, the business employs _____ employees.
number of employees

The following are the key vendors/suppliers: (list their name, location, what they provide, and their payment terms)

Vendor/Supplier #1

name and location of vendor/supplier

product/supplies they (will) provide the business

payment terms set up with them

Vendor/Supplier #2

name and location of vendor/supplier

product/supplies they (will) provide the business

payment terms set up with them

Vendor/Supplier #3

name and location of vendor/supplier

product/supplies they (will) provide the business

payment terms set up with them

Following is a brief description of the day-to-day operations of the business:

The business provides/will be providing the following quality/price combination (check one only):

low price/low qual./service low price/medium qual./service low price/high qual./service

med.price/low qual./service med. price/medium qual./service med. price/high qual./service

high price/low qual./service high price/medium qual./service high price/high qual./service

Following are prices for the top five products/services which (will) realize the following gross profit:

<i>Product/Service</i>	<i>Price</i>	<i>Cost of Goods</i>	<i>Gross Profit</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

The average overall gross profit margin for the business is/will be: _____
round up or down to the nearest % (i.e. 59%)

The main competitors are _____
name 1 or 2 competitors

and their strengths and weaknesses are _____
describe how competitors stack up in terms of price, quality, service, location, convenience, reputation, range of services, etc.

My business uses/will use the following marketing strategies (choose 5 and rank in order of most effective):

- | | |
|---------------------------------------|---|
| _____ retail marketing | _____ website |
| _____ telemarketing | _____ e-zine |
| _____ direct/outside sales calls | _____ links to other websites |
| _____ direct mail | _____ affiliate relationships with other websites |
| _____ word-of-mouth/referral programs | _____ search engine listings |
| _____ display advertising/print ads | _____ Internet publicity |
| _____ tradeshow/conventions/fairs | _____ Internet directories |
| _____ Yellow pages | _____ Internet message boards/forums |
| _____ networking | _____ blog |
| _____ Publicity | _____ e-mailings |
| _____ Promotional activities | _____ Internet pay-per-clicks |
| _____ Other | _____ search engine ads |

The marketing goals for the business are (describe how many new clients/customers or how much new business you want to bring in monthly/yearly): _____

Following are the top features/benefits for the business' top products/services:

<i>Product/Service</i>	<i>Feature</i>	<i>Benefit</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The following warranties/guarantees come with these products/services:

<i>Product/Service</i>	<i>Warranty/Guarantee</i>
_____	_____
_____	_____
_____	_____

The most competitive factors in the marketplace are (list why a customer/client might *not* buy from the business):

Financials

The average sale for the business is/will be: _____
list the dollar volume of your average sale to a single customer/client

The business can fulfill an order for a product or service: _____
list a timeframe, (i.e. immediately, within a day, week, month, etc.)

Money from the average sale is collected: _____
list your terms to your customers/clients, (i.e. pre-pay, COD, net 30, etc.)

Expected average monthly sales totals for the next (first) year are/will be: _____
list a dollar volume for your average monthly sales total

Expected average monthly expense totals (not including cost of goods) for the next (first) year are/will be: _____
list a dollar volume

The expected breakeven point is _____ and it will occur in _____
list a dollar volume in sales list the month/year

The total money needed for start-up/growth is: _____
list the dollar amount that you'll need to use until you can reach your breakeven point

The start-up/growth funds will come from:

<i>Source</i>	<i>Amount</i>	<i>Date Expected To Receive Funds</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Attachments

The following materials are attached to this business plan:

Organization

_____ Resume(s) of key personnel

Financials

_____ Start-up Costs Worksheet

_____ Monthly Expenses Worksheet

_____ 1-year Cash Flow Projections Worksheet

_____ Personal Financial Statement(s)

_____ Past 2 years of tax returns (personal)

_____ Past 2 years of tax returns (business)

_____ Profit and Loss Statement (current)

_____ Balance Sheet (current)

_____ List of "aged" Accounts Receivable (current)