Start-Ups

Building A Business Plan

Template
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Executive Summary

**What:** Type of business, products/services, business concept, “the opportunity,” etc.

Who: You and your team (owners and key personnel), target markets and competition

**Why:** Other reasons you think your business will succeed, e.g. economics, profit potential, market share, sales projections, months to break-even or positive cash flow, market and industry trends, competitive advantage, etc.
After reviewing this section the reader should:

• Want to learn more about your business
• Have a basic understanding about your company

Business Description & Vision

Mission Statement

Company Vision

Business Goals and Objectives

Short Term

Long Term
Brief History of the Business

List of Key Company Principals

After reviewing this section the reader should know:

- Who the business is and what it stands for
- Your perception of the company’s growth & potential
- Specific goals and objectives of the business
- Background information about the company

Definition of the Market

Business Industry and Outlook

Specific Customer Needs
Targeted Customers

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Customer Profile

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After reviewing this section the reader should know:

• Basic information about the industry you operate in and the customer needs you are fulfilling
• The scope and share of your business market, as well as who your target customers are

Description of Products and Services

Description of Products and Services

________________________________________________________________________
________________________________________________________________________
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________________________________________________________________________
________________________________________________________________________
Product Pricing

Description of how your products and services are competitive.

Reference applicable graphics and brochures

After reviewing this section the reader should know:

- Why you are in business
- What your products and services are and how much they sell for
- How and why your products & services are competitive

Organization and Management
Description of how the company is organized

Legal form of ownership

Explanation of how things get done

Required licenses and permits

Bio description of key company managers
After reviewing this section the reader should know:

- The legal form of ownership
- Who the leaders are in your business as well as their roles
- The general flow of operations within the firm

**Marketing and Sales Strategy**

Identify and describe your market – who your customers are and what the demand is for your products and services

Describe your channels of distribution

Explain your sales strategy, specific to pricing, promotion, products and place (4Ps)
After reviewing this section the reader should know:

- Who your market is and how you will reach it
- How your company will apply pricing, promotion, product diversification and channel distribution to sell your products and services competitively

Financial Management

**New Business**

- Estimate of start-up cost
- Projected balance sheet (1 year forward)
- Projected income statement (1 year forward)
- Projected cash flow statement (12 months forward)

**Existing Business**

- Balance sheets (last 3 years)
- Income statements (last 3 years)
- Cash flow statement (12 months)

**If Applying for a Loan**

- Current personal financial statement on each principal
- Federal tax return for prior year
After reviewing this section the reader should:

- Have a good understanding regarding the financial capacity and/or projections for your company

**Appendices**

**This section should include as attachments:**

1. Company brochures
2. Resumes of key employees
3. List of business equipment
4. Copies of press articles and advertisements (if available)
5. Pictures of your business location and products
6. Information supporting the growth of your industry and/or products
7. Key business agreements, such as lease, contracts, etc.