**CONFIDENTIAL**



BUSINESS PLAN

COMPANY NAME

DATE PREPARED

MM/DD/YYYY

CONTACT

Contact Name

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City, State, Zip, Country

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# EXECUTIVE SUMMARY

The executive summary is - arguably - the most important section of your business plan. Catch the eye of the reader, summarize the key points of your business plan - and show why you’re a solid investment which will bring a healthy return. Write this section last to make sure you capture everything you’ve covered in the business plan in a simple, impactful summary of 2 pages or less.

*Highlights:*

What are the main steps you’ll take to be successful?

What is your unique value proposition?

Why should a potential investor, partner or employee keep reading?

# COMPANY OVERVIEW

Start with a high-level introduction to the industry and niche you work in, including any indication of likely changes and developments in the market. Using data like industry trends and demographics - and highlighting governmental and economic influences - adds depth. Move onto an overview of your company in particular, and your place in the industry landscape you’ve presented.

# PROBLEM & SOLUTION

## THE PROBLEM

Use this segment to help your reader see the unmet need you’ve identified - and how you’re able to help. You’ll go into some of these topics in more depth later - this is an introduction and summary of your product or service, and how it stands out.

What problem are you solving for the consumer?

How big is the problem?

What solutions are out there currently?

## OUR SOLUTION

What can your business do to solve the problem?

# MARKET ANALYSIS

## MARKET SIZE & SEGMENTS

Paint a picture of the customer you’re catering to, and the size of the market you’re working in. By giving a detailed view of the target audience for your company including income levels, you can show how your product or service will appeal. You’ll also need to describe existing competitors, and how you’ll either grow the overall market or take market share from others.

Who is your target customer?

How big is the market for your business?

How can you grow the market or grab market share from competitors?

How much will your target audience pay for your product/service?

# COMPETITION

## CURRENT ALTERNATIVES TARGET BUYERS ARE USING

How much competition is out there?

Who are your competitors? What are their strengths and weaknesses?

## OUR COMPETITIVE ADVANTAGES

Here you can describe the opportunity you’ve identified, and how your business will attract and retain customers. Set out the unique features of your business and how this will make you stand out from the competition.

How is your business solution better than the competitors?

# PRODUCT OR SERVICE OFFERINGS

## PRODUCT OR SERVICE

Use this section to add more detail about the product or service you are offering. Describe how it benefits the buyer, and its unique selling proposition.

# MARKETING

## MARKETING PLAN

Show how you’ll connect with customers, encourage repeat sales, and build an impactful brand reputation. Go into detail about your marketing objectives and strategy here, including the channels you’ll use, the likely costs, campaign goals, and your overarching plan of action.

# ORGANIZATION AND MANAGEMENT

Here you can cover both the legal structure of your business and give some insight into who will be leading it. Start with the type of legal entity you have and move into the leadership team and any other key staff members. Use this to state your overall mission statement and how it relates to your team and organization.

## MANAGEMENT AND TEAM:

Who is working with you?

What experience do they have?

What makes your team qualified to make your business successful?

Who do you need to hire?

# MILESTONES & METRICS

## MILESTONES

List your key milestones and the dates that you hope to accomplish them by. If you’ve already accomplished key goals for your business, list them here as evidence that your business is getting traction.

## 

## KEY PERFORMANCE METRICS

Explain which performance metrics are most important for understanding how your business is doing. What does success mean for you, and how will you know it when you see it?

# FINANCIAL FORECASTS

## KEY ASSUMPTIONS

Depending on the stage your business is at, this section may include live sales and profit data - or be more focused on projections. If you’re using existing sales data, include the detail as an appendix and give highlights here. If you use projections, give details of the assumptions made to come up with forecasts, such as market research and trend information.

If available, add key financial information such as your sales forecast, profit and loss projections, balance sheet and cash flow.

# FINANCING

## SOURCES OF FUNDING

## USE OF FUNDING