

BUSINESS PLAN OUTLINE

A business plan is a road map to success in business. Plus, this is a requirement in order to borrow funds to finance the business.

1. Executive Summary (1 page)

Most important part of business plan. Summarizes the other sections of the business plan. Write this section last.

2. General Company Description (1 page)

Discuss the nature of the business.

1. Name and location
2. Mission of business
3. Business model
4. Legal form, eg., C-Corp, S-Corp, LLC, Sole Proprietorship
5. Products and/or services, describe if new or unique

3. Products and Services Description (1 page)

Discuss the products and services.

1. Products and/or services, describe if new or unique
2. How they'll be sourced or produced
3. How you'll segment your products or services
4. Key differentiators between your products or services and competitors (Product level Unique Value Proposition)

4. Marketing (2-3 pages)

This section should demonstrate knowledge of the industry. Market research must indicate that a sufficient market exists.

1. Market Analysis – describe how market data was derived
2. Size and growth trends – set targets
3. Economics, seasonal effects, technical factors
4. Competition – who, how to overcome – compare strengths and weaknesses
5. Sales – describe how to capture market segment
6. Strategy – advertising, selling techniques, PR, create new market, etc.
7. Unique Value Proposition
8. Pricing policy
9. Risk factors

5. Operations (1-2 pages)

Describe the operation of the business. Cover such items listed below as are applicable. Include cost estimates as required.

1. Plant and facilities
2. Distribution and service policies
3. Management information systems – accounting, etc.
4. Quality Control strategy



5. Inventory control
6. Equipment

6. Management and Ownership (1-2 pages)

1. Form of business
2. Organization Chart
3. Principal/key employees (Include resumes in Appendix)

7. Financial Plan

1. Statement of Financial Position
 - 1.1 Startup Balance Sheet
 - 1.2 Projected Balance Sheet, 1 year, 5 years
2. Cash Flow Statement
 - 2.1 Monthly for first year
 - 2.2 Quarterly or annually for 2-3 years
3. Show sources of funds
4. Show how borrowed funds will be applied
5. Show Assumptions

7. Appendices

Include supporting documents, not necessarily provided for all distributions. For example:

1. Pictures
2. Market studies
3. Patents, copyrights, trademarks
4. Tax returns
5. Personal information
6. Contracts, letters of intent,