

BUSINESS PLAN

Organization

My business named _____

and located at _____

is in the following phase:

Check One:

- Startup
- Initial Operations
- Expansion
- Stable Operations

My type of business is: (Check all that applies)

- Retail
- Service
- Distribution/Wholesale
- Manufacture/Production
- Internet
- Other

The Business Organized as:

and has been operating since _____

or will open in _____

MISSION/VISION STATEMENT

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

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

Owner #1:

Owner #2

Owner #3

The business employs/will employ the following key employees/advisors (Name top 3)

Employee/Advisor #1

Employee/Advisor #2

Employee/Advisor #3

Currently, my business employs _____

employees. The following are my key vendors/suppliers:

(List their name, location, what is provided and any

payment terms)

Vendor/Supplier #1:

Vendor/Supplier #2:

Vendor/Supplier #3:

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

MARKETING

My business is in the -----

industry, which is:

- New
- Expanding

Stable

The industry size is _____

The trends within my industry are: (Briefly describe the prevailing trends)

The following is a depiction of my target market: Briefly describe the markets you're targeting)

My business will provides/will provide the following quality/price combination: (Check ONE only)

- Low Price/Low Quality
- Low Price/Medium Quality
- Low Price/High Quality
- Medium Price/Low Quality

- Medium Price/Medium Quality
- Med Price/High Quality
- High Price/Low Quality
- High Price/Medium Quality
- High Price/High Quality

Following are prices for my top 5 products/services which will realize the following gross profit:

Product/Service _____

Price _____ Cost of Goods _____

Gross Profit _____

The overall gross profit margin for my business is/will be:

My main competitors are:

Their Strengths and Weaknesses

STRENGTHS	WEAKNESSES

My business will use/use the following marketing strategies:
 (Choose 5 and rank importance 1-5)

	Phone Calls		Website
	Outside Sales		Search Engine Optimization (SEO)
	Tradeshows/ Convention		Email
	Promotional Events		Directory Sites
	Networking		Social Media
	Speaking Engagements		Pay-Per-Click (PPC) Advertising
	Direct Mail		Display and Print Ads
	TV/Radio Ads		Referrals
	Press Releases		Others (Specify)

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

FINANCIALS

The average sale for my business will be/is

My business can fulfil an order for a product/service:

Money from the average sale is collected:

Expected average monthly sales totals for the first (next) year will be/are: -----

My expected breakeven point is -----

and it will occur in -----

The total money needed for start-up/growth is:

The startup/growth funds will be coming from:

Source: -----

Amount: _____

Date Expect To Receive Funds: _____

ATTACHMENTS

The following materials are attached to this plan:

Organization

_____ Resume (s) of key personnel

Marketing

_____ 1 tear marketing flow worksheet

Financials

_____ Startup Costs Worksheet

_____ Monthly Expenses Worksheet

_____ 1-year Sales Forecast

_____ 1-year Cost of Goods Forecast

_____ 1-year Gross Profit Forecast

_____ 1-year Cash Flow Projections Worksheet

_____ Personal Financial Statement (s)

----- Past 2 years of Tax Returns (Personal & Business)

----- Profit & Loss Statement (Current)

----- Balance Sheet (Current)

----- List of "Aged" Accounts Receivables (Current)