

**Your Company Name**



**Your Street Address**  
**City, State Zip**  
**Phone Number**  
**Your Email Address**  
**Your Company Website**

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## Executive Summary

This section should:

- Be written last
- Provide an enthusiastic snapshot of your company, explaining who you are, what you do and why, and where you're going
- Be less than 2 pages in length

After reviewing this section, the reader should:

- Have a basic understanding about your company
- Understand the goals you have for your company and your plan for achieving them
- Want to learn more about your business

## **Business Description and Vision**

This section should include:

- Mission statement (business purpose)
- Company vision (statement about company growth)
- Business goals and objectives
- 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 and potential
- Specific goals and objectives of the business
- Any key risks to achieving your vision/goals for the business
- Background information about the company and its key people

## Definition of the Market

This section should:

- Describe your business industry and outlook
- Define the critical needs of your perceived or existing market
- Identify your target market
- Provide a general profile of your targeted customers/clients
- Describe what share of the market you currently have and/or anticipate

After reviewing this section, the reader should know:

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

## **Description of the Products and Services**

This section should:

- Specifically describe all of your products and services
- Explain how your products and services are competitive
- If applicable, reference a picture or brochure of your products, which should be included in the plan's appendix

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 and services are competitive

## Marketing and Business Development

This section should:

- 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:

- What 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

## Organization and Management

This section should:

- Provide a description of how your company is organized as well as an organization chart
- Describe the legal structure of your business (sole proprietorship, partnership, corporation, etc.)
- Identify necessary or special licenses and/or permits required for your business operations
- Provide a brief biography/description of key managers within the company

After reviewing this section, the reader should know:

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



## Financial Management

This section should include:

- For a new business:
  - Estimate of start-up costs
  - Projected balance sheet – 1 year forward
  - Projected income statement – 1 year forward
  - Projected cash flow statement – 1 year forward
- For an existing business:
  - Balance sheets (last 3 years)
  - Income statements (last 3 years)
  - Cash flow statement (last year)
- If applying for a loan (in addition to the above):
  - Current personal financial statement for each principal
  - Federal tax return for prior year

After reviewing this section, the reader should:

- Have a good understanding of the financial capacity and/or projections for your company
- Understand what resources/investments will be required to execute the vision you have for your business and how you plan to finance them

## Operations

This section should:

- Describe how and where you produce your products (i.e. quality control, production techniques and costs, inventory control, and product development)
- Describe the locations of production, sales, storage areas, and buildings, and if expanding, the proposed facility
- Explain any relevant regulations, permits, or special zoning and/or insurance requirements
- Describe your personnel, labor force, and workforce training
- Explain your inventory, value of stock, and turnover
- Describe your suppliers, credit policies, delivery policies, as well as how you manage your A/R and A/P

After reviewing this section, the reader should know:

- The daily operation of the business
- The company's location, equipment, people, processes, and surrounding environment

## Execution Plan

This section should:

- Tie back to the goals/objective you outlined in your Business Description and Strategic Vision
- Detail how you plan to activate the strategic vision and goals for your company
- Include key milestones, objectives, and timing to execute against your plan
- Outline the key operational/strategic initiatives required to successfully reach the goals included in the plan
- Consider any key risks or challenges to executing the plan and outline options to address these risks and challenges

After reviewing this section, the reader should:

- Have a good understanding of how you plan to achieve your vision/goals for your business
- Understand any resources (e.g. new hires, technology, equipment) that you will need to implement this plan
- Have a sense for the timeline of executing your plan and the sequencing of key activities



## Appendices

This section should include as attachments:

- A 2-page outline of at least one key strategic growth option
- Company brochures
- Resumes of key employees
- List of business equipment
- Copies of press articles
- Picture of your business location and products (optional)
- Information supporting the growth of your industry and/or products (optional)
- Key business agreements, such as lease, contracts, etc. (optional)