
Business Plan

NAME OF COMPANY

(INSERT PICTURE)

Name
Home Address
City, State Zip
Phone #

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Executive Summary

Type your text here.

- *What are they doing? (Brief Description)*
- *How much financing is needed?*
- *What will the financing purchase?*
- *Where are they located?*

{INSERT BUSINESS SUMMARY GRAPH}

Objectives

Type your text here:

- Identify an objective.
- Identify an objective.
- Identify an objective.
- Identify an objective.

(Eg. Obtaining the loan, X% sales growth, Maintaining Expenses, Establishing Market Share)

Mission

- *Quick summary of what the company does. How does the company affect its customers?*

Company

The following section should describe the details of the company. How did the business or idea start? What type of ownership? What products and/or services will they offer? Where are they located? How is the company's new product or service different from everyone else? How do they plan to advertise the existence? Try to establish links to the objective, mission and executive summary to describe each section.

Company Ownership

- *What type of company are they starting – sole proprietorship, partnership, corporation?*
- *What percentage does each owner own?*

Company History

Existing –

Give brief history of operations

Start-Up –

Give summary of the arrival to the idea of the business

Company Location and Facilities

Give the address of the business and surrounding places and/or highways that will places to encourage growth.

Give a description of the inside facility and its relevance to the business.

Justify why the location is perfect for the business

Product / Service

What type of product or service do they plan to sell? Describe each product or service in detail. How does their product or service compare to the competition?

Product Description / Service

Describe each business product or service. The more complex the industry; the more specific the description.

Product line 1

Type your text here.

Product line 2

Type your text here.

Product line 3

Type your text here.

Important Product Features and Comparison

How do the client's products and/or services compete against the other brands and/or competition?

What makes the business unique to attract customers?

Customer Service

How do you plan to service the product (which includes customer support, guarantees, and hours of operation for the business).

Market Analysis

Industry Analysis

Give factors and/or news that is affecting the current industry. (e.g. newspapers, magazines, SearchBank)

Market Forecast / Target Market

Give factors that describe the surrounding market that the company plans to operate in. (e.g. Demographics, traffic counts)

What type of customers will the company pursue? Link answer to demographic information.

Keys to Success

In order for (COMPANY NAME) to remain competitive in its target market, the business must focus on the following competitive qualities.

List three or more ways the company will obtain a strategic advantage over its competitors. (e.g. efficiency, experience, location)

Competitive quality 1

Type your text here.

Competitive quality 2

Type your text here.

Competitive quality 3

Type your text here.

Give step-by-step strategies to meet the objectives set by the company. Also, give plans for any future service or product lines beyond the three-year projections.

Business Strategy and Implementation

Give step-by-step strategies to meet the objectives set by the company. Also, give plans for any future service or product lines beyond the three-year projections.

Advertising

How does the business plan to advertise the company?

(e.g. yellow pages, flyers)

Marketing Strategy

How is the company planning to use the advertising listed in advertising section to build a solid customer base?

What type of initial promotions?

Sales Plan

What plans does the company have to increase the customer base to meet the objectives? What offers or guarantees?

Strategic Alliances

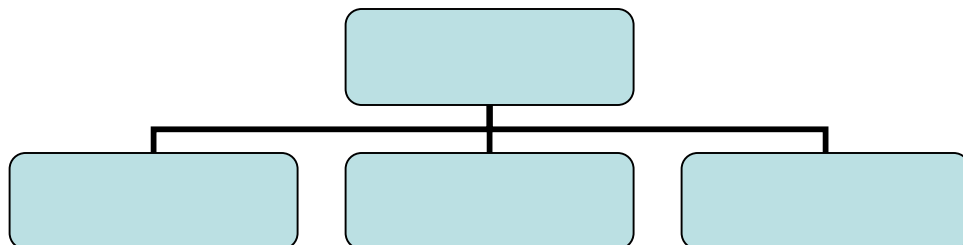
What strategic alliances does the company have?

- *Offering more product lines?*
- *Working with distributors?*
- *Access to free training and/or technical support?*

Organization

Describe each manager's organizational responsibility

Organizational Structure



Management Team

List all personnel in management positions. Give experience for each individual person to meet the job responsibilities stated in the organization section.

Name, Position

Type your text here.

Name, Position

Type your text here.

Name, Position

Type your text here.

Name, Position

Type your text here.

Management Team Gaps

Identify skills the team does not possess and discuss how the company plans to fill these needs.

State any gaps that management has in the operation of the company. Typical examples are legal and accounting.

Other Management Team Considerations

Any additional information that may be pertinent to the business plan. For example, the client may have access to business information from an owner in a non-competitive area

Financial Analysis

The projected financial statements for the first three years of operation are located in the Appendix.

Financial Ratios

The following table presents {THE COMPANY}'s financial ratio calculations based on the projected financial statements in Appendix.

{INSERT RATIO TABLE}

Financial Assumptions

The table below lists the assumptions used to create the financial projections located in the Appendix.

{INSERT ASSUMPTIONS TABLE}

Start-Up Costs and Capitalization

In order to purchase {THE COMPANY'S NAME}, {CLIENT NAME} requires \$XX,XXX in commercial funding. The table below provides a summary of the proceeds of the loan funds.

List start-up or funds usage with as much detail as possible. This can be done in table format or by chart.

Break-Even Analysis

Type your text here.