

Executive Summary

Organization

Description of Business

Products & Services

Location

Owners & Management Team

 Who Are They?

 Why Are They Qualified?

Board of Director's or Advisory Board

Organization Chart

Legal Structure

Employee Recruitment & Retention

Recordkeeping

Professional Relationships

 Attorney

 Banker

 CPA/Accountant

 Insurance Agent

 Consultant

 Other Professional Advisors

Industry & Markets

Industry

 Description of Industry

 Industry Trends

 Laws & Rules Applying to Your Industry

 Special Industry Considerations

 Capital Restraints

 Environmental Issues

 Ease/Difficulty of Entering Industry

Business Plan Template

Market Segments

- Brief Description of Major Market Segments
- Detailed Description of Your Market Segment
- Special Market Segment Considerations

Competition

- List Competition (Direct & Indirect)
- Brief Description of Direct Competitors
 - Company Name & Locations
 - Description of Product or Service
 - Strengths & Weaknesses
 - People
 - Capital
 - Technology
 - Intellectual Property
 - Market Position
 - History
 - Location

Customers

- Who Are They?
- Where Do They Live & Work?
- Where Do They Play?
- How Much \$ Do They Make?
- Define Using WHATEVER Socio-Demo-Geo-Characteristic Is Important

Company

- Strengths
- Weaknesses
- Opportunities
- Threats

Business Plan Template

Marketing Plan

Market Situation Analysis

- Define the Market

- Identify the Target

- Unique Value Proposition/Unique Selling Proposition

- Brand

Marketing Strategy

- Budget

- Goals (Market Objectives)

- Timetable

- Resources Needed

- Monitor/Measure/Test

Implementation Tactics

- Action Plan

- Specific Advertising & Promotion Campaigns

- PR Campaigns

- Networking & Professional Organizations

Financial Analysis & Pro Forma Financials

Financial & Sales Goals

Resources Needed

- Capital Equipment

- Start-Up Costs

- Marketing Collateral

- Product Samples

Summary of Financial Need

Pro Forma Income Statement

- Pro Forma Balance Sheet

- Cash Flow Report

- Break Even Analysis

- Ratio Analysis with Industry Standards

Financial Projection Assumptions

Business Plan Template

Addenda

Management Resumes

Owners Personal Financial Statement

Owners Tax Returns

Legal Documents

- Articles of Organization

- Operating Agreement

- Real Estate & Equipment Lease Agreements

- Other Loan or Financing Agreements

- Patents

- Manufacturing Agreements

- IRS Taxpayer ID

- Patents

- Building & Equipment Leases

- Management Agreements

- Licenses & Permits

- Non-Compete Agreements

Other Pertinent Documents

- Product or Service Information

- Relevant Market Information

- Product Brochures

- Published Articles and White Papers

- Product Pictures

- Product Samples

- Product MSDS Sheets

- Product License Agreements

- Health & Safety Information

Market Studies

Competitor Marketing Information

Trade Journal & Magazine Articles

3rd Party Market Research