



**TEMPLATE FOR A BUSINESS PLAN**

**NAME OF YOUR BUSINESS  
<ADDRESS OF BUSINESS>  
<CONTACT DETAILS>**

**List of Owners:**

**Prepared on the <date>**

**Prepared by: <name>**

**Copy Number 1**

## **TEMPLATE FOR A BUSINESS PLAN**

### **Table of Contents**

#### **I. Executive Summary**

- A. Background of the Business
- B. Competition
- C. Unique Selling Proposition/Advantage
- D. Capital Requirements and Breakdown of Uses of Funds
- E. Vision / Mission Statement
- F. Management
- G. Financial Projections

#### **II. The Organizational Plan**

- A. Summary Description of the Business
- B. Implementation Plan
- C. Administrative
  - Intellectual Property
  - Location
  - Legal Structure
  - Management
  - Personnel
  - Accounting / Legal

#### **III. The Marketing Plan**

- A. Overview and Goals of Your Marketing Strategy
- B. Market Analysis
  - Target Market
  - Competition
  - Market Trends (Industry and Customer Trends)
  - Market Research
- C. Marketing Strategy
  - The First Year: Marketing Activities Budget
  - Marketing Strategy after the First Year
- D. Customer Service
- E. Implementation of Marketing Strategy
- F. Assessment of Marketing Effectiveness

#### **IV. Financial Documents**

- A. Pro Forma Cash Flow (Budget)
- B. Three-Year Income Projection

#### **V. Supporting Documents**

- A. Personal Resume/s of Owner/s
- B. Copies of Leases, Mortgages, Purchase Agreements, Etc.
- C. Letters of Reference
- D. Contracts
- E. Other Legal Documents