

# **EXAMPLE BUSINESS PLAN LAYOUT**

## **Cover Sheet**

- Company Name
- Presented To
- Date
- Copy number

## **Table of Contents**

- List key sections of business plan

## **Executive Summary**

- The Company Overview
- Mission Statement
- Statement of Funding
- Statement of Purpose

## **Description of Business**

- Company Ownership
- Description of Product/Service (overview) What are you going to sell?
- Company Location and Facilities
- Licenses/Permits/Regulations
- Overview of key items
- Insurance
- Overview of most pertinent concepts
- Start-up Costs
- Listing of key purchases necessary to execute business plan

## **Market Analysis**

*(External factors impacting marketing)*

- Target Market and Demographics
  - Description of Customers
  - Market Segments
  - Unmet needs & how you fill them
  - Key trends
- Quantify Market Potential

- Number of customers
- Number of units
- Trends in consumption
- Future projections
- Competitive Analysis
  - List of Competitors
  - Positioning Analysis
  - Pricing Analysis (overview, detail could be put in appendix)
  - SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)

## **Marketing Strategy and Implementation**

*(Internal marketing activities)*

- Marketing Plan
  - Product / service offering
  - Pricing strategies
  - Marketing communications
  - Promotional strategies
  - Service excellence
  - Guarantees / warranties / returns
  - SWOT analysis
  - Sales forecast
  - Marketing research
- Competitive Edge
  - Why will the customer select your company vs. other options? (including doing nothing)
  - What is the compelling reason you are giving the customer to purchase your product?
- Distribution and Sales
  - Key sales opportunities
  - List distribution channels
  - List major distribution partners
  - List communication strategies
  - Define sales / distribution
- Strategic Alliances
  - Key relationships

## **Operations Plan**

*(How will we produce what it is we sell)*

- Manufacturing Plan
  - Manufacturing Facilities
  - Key Developments
- Research & Development
  - Key projects

- Strategies to keep ahead of competition
- Purchasing Plan
  - Key vendors
  - Purchasing strategies
- Warehousing / Shipping Operations
- Key Capital Expenditures
- Equipment

## **Human Resources**

- Management Summary
  - List specific managerial skills
  - Answer question “why are you qualified to run this business?”
- Organizational Structure
  - Organizational Chart
  - Job description summaries for key positions
- Personnel Plan
  - How many people and what is the timing?
  - Describe return on investment analysis pertaining to people
  - Benefits and Other Associated Employee Costs
  - Recruiting and selection processes

## **Financial Plan**

- List Key Assumptions (support your financial projections)
- Break-even Analysis
- Historical Financial Statements (current, 3-5 years if available)
- Projected Profit and Loss (monthly for next year, yearly thereafter for 2-5 more years)
- Projected Cash Flow (along with projected financing requirements)
- Projected Balance Sheet
- Pertinent Business Ratios

## **Appendix**

- List key items not included in business plan
- Management resumes
- Owner's Personal Financial Statement
- Manufacturing details – key products
- Customer contracts
- Vendor contracts
- Sales literature
- Key consultants / advisory board

- Customer letters
- Results from marketing research

*Note: Not every business plan will have every one of these items. And some plans may require items that are not included in this list. Business plans follow a general order, but are written for a specific business and for various purposes. Be sure the business plan you write serves the purposes that you intend for it.*