

BUSINESS PLAN OUTLINE

- i. Cover Page**
 - ii. Mission Statement**
 - iii. Fact Sheet**
 - iv. Table of Contents** (*this page with nos.*)
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- I. Executive Summary** (*1-1½ pages*)
 - a. Business Concept
 - b. Market Opportunity (Market Planning)
 - c. Financial Summary
 - II. Business Description** (*3-5 pages*)
 - a. The Company: (history/background, legal formation, owner qualifications, location, opening or start date; why doing this business, equipment avail./required, etc.)
 - b. Product and/or Service Mix (Primary, Secondary & Fringe)
 - III. Market Research & Analysis** (*2-3 pages, plus matrix chart for competition*)
 - a. Industry Background (history, current state, new developments/regulations, impacts)
 - b. Market Size (demographic analysis of market, number of potential customers, number of competitors, level of demand)
 - c. Competition (matrix chart, plus analysis of top 3 advantages/disadvantages of comp.)
 - d. Customer Analysis (Primary, Secondary, Fringe; trends affecting customers)
 - IV. Marketing Strategies** (*3-4 pages*)
 - a. Overall Strategy (discuss some/all of the following 9 strategies): Entry, Exit, Niche/Uniqueness; Proprietary; Distribution; Educating customer; Image; Financial (how you get start-up/expansion capital); Pricing; Customer Service
 - b. Promotional Strategy
 - Publicity (it's free and can be influenced, but not controlled)
 - Advertising & Media (it costs, but can be controlled)
 - Sales Techniques
 - V. Operations** (*for manufacturing or other business with processes, including restaurants*) (*1 page*)
 - VI. Management Team** (*for businesses with multiple owners or managers; homebased business may put management & advisory board in Business Description section*) (*2 pages*)
 - a. Management backgrounds/resumes
 - b. Advisory Board (Who—relationship to you; qualifications; how often you meet, etc.)
 - VII. Overall Schedule** (*2 pages*)
 - a. Goals/Milestones/Critical Dates, Times
 - b. Daily/Weekly/or Monthly Schedule
 - VIII. Financials**
 - a. Balance Sheet (Personal & Business, separately)
 - b. Income Statement (also called Profit & Loss Statement) with explanations
 - c. Cash Flow with explanation
 - d. Start-Up Expense Budget with explanations
 - IX. Appendices** (resumes, flyers, price lists, photos, 2 yrs. tax returns, appraisals, etc.)