



Business Plan Outline

- I. **Description of the Business/Executive Summary**
 - A. Who: Name of business, ownership/management team
 - B. What: Type of business, form of business entity, product and service offerings
 - C. When: Projected startup date or existing business
 - D. Where: Business location, geography served
 - E. Why: Customer needs and wants met, market trends, projected financial results
 - F. How: Marketing strategy, competitive advantage, sources of capital
- II. **Marketing Plan**
 - A. Product and service offerings
 - 1. Capabilities of your business
 - 2. Products and services offered
 - B. Markets and customers
 - 1. Markets
 - 2. Customer segments
 - 3. Target customers
 - 4. Customer needs and wants
 - 5. Customer buying and selection criteria
 - C. Competition
 - 1. Direct and indirect competitors
 - 2. Competitor strengths and weaknesses
 - 3. Your source of competitive advantage
 - D. Marketing strategy
 - 1. Product and service packages
 - 2. Pricing strategy
 - 3. Location, distribution channels and strategy
 - 4. Sales and promotion strategy
- III. **Management Plan**
 - A. Management team skills and experience
 - B. Other key employees and outside advisors
 - 1. Skills and experience
 - 2. Compensation
 - C. Operations
 - 1. Organizational chart
 - 2. Roles and responsibilities
 - 3. Goals and measurement methods
 - 4. Key success factors
 - D. Resource budgets
- IV. **Financial Projections**
 - A. Uses of capital
 - 1. Startup budget
 - 2. Income statement (operating budget or pro forma)
 - 3. Monthly cash flow projection
 - 4. Balance sheet
 - B. Sources of capital
- V. **Supporting Documents – (Cash flow, Income Statement, Credit Report, Tax Returns, Personal Financial Statement, Legal Documents)**