

Business Plan Work Sheet

Name of Company and contact information

Executive Summary (overview of the business plan; can be written last; no longer than a page)

Brief overview of company: what it is and why it will be successful. Include mission statement, product/service and basic info. Growth plan for up to five years is good.

Products/Services: Description of products or services or both. Benefits to customers and product lifecycle. Share intellectual property info (copyrights/patents) here. If R&D is being done, explain here.

Goals/Objectives:

Market Analysis – overview of industry and outlook. Competitive research looking for trends and themes. Successful competitors info is good. Can you do it better or differently and work in your market area.

Audience/Customer (pricing structure)

Future of the industry (research, articles, marketplace, changes, regulations)

Organization/Management: resumes of owners/operators; background and growth

Company Structure (tax ID, employee(s), growth)

Funding Needs (bank, SBA, bootstrap; one year, five year)

Financial Projections (one, three & five year best) (accountant, legal)

Be realistic; be conservative.

Market Analysis (competition; how does your business fit in now and in the future)

Appendix:

MISC: Logo, business cards, website, building, growth plans, employees,