

Business Plan Outline

I. EXECUTIVE SUMMARY

1-3 page overview of the entire plan (typically written last)

II. PERSONAL BACKGROUND INFORMATION

Personal Profile of Skills and Experience

III. BUSINESS CONCEPT

General Description of the Business

Business Goals and Objectives

Industry Information: *Industry Background • Current and Future Trends • Business "Fit" in the Industry*

IV. BUSINESS ORGANIZATION

Ownership, Regulations and Taxes

Management Issues: *Managing People • Managing Risk • Technology*

Managing the Books and Records

V. THE MARKETING PLAN

Products/Services: *Description • Features/Benefits*

The Market Analysis: *Customer Analysis • Competitive Analysis • Market Potential*

Marketing Strategies: *Product or Service Lines • Positioning • Packaging • Pricing Structure • Distribution • Promotional Strategies • Customer Service and Sales*

VI. THE FINANCIAL PLAN:

Investment Required for Start-Up: *Start-up Costs/Needs • Investment Required—Bank Loan/Self*

Cash Flow Projections: *One year projections and explanations*

Additional Financial Information: *3 years profit & loss projections • 3 years balance sheet projections • Explanations and assumptions Historical financial statements (for an existing business) • Personal Financial Statement*

Who will be responsible for implementing financial plan?

VII. ATTACHMENTS

Résumé

Credit references

Letters of intent to purchase (*or copies of contracts*)

Copies of legal documents

Tax returns (3 years personal and 3 years business if applicable)

Photos, maps, floor plans, samples, promotional materials, etc.

Organization chart, job descriptions

Other...