**Business Plan Template**

**Five Important Tips**

**Before You Start!**

1. The business plan should tell a compelling story about your business, explaining who, what, when, where, how and why.

What is your vision, What problem are you solving for your customer, what is your solution to their problem, what is your value proposition (what makes your business stand out)

1. Your plan should be focused and clear. It’s not about the number of pages or style of the cover.
2. The plan should define specific business objectives and goals with general parameters to guide the organization.
3. Writing a business plan should force logic and discipline into a business.
4. A good business plan is a living document. It should be updated regularly.

**LET’S GET STARTED!**



www.catalystcenter.org

# Application  Description automatically generatedU.S. Small Business Administration

## Small Business Training Network

[www.sba.gov/training](http://www.sba.gov/training)

**Title Page**

**Your Company Name**

**Business Plan**

**Date**

Street Address City, State & Zip Code

Phone Number E-Mail Address Web Address

**Table of Contents**

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**Executive Summary**

* Be written last
* Provide an enthusiastic snapshot of your company, explaining who you are, what you do and why
* Be less than 2 pages

**This section should:**

* Want to learn more about your business
* Have a basic understanding about your company

**After reviewing this section the reader should:**

Start here…

**Business Description & Vision**

* Mission statement (business purpose)
* Company vision (statement about company growth)
* Business goals and objectives
* Brief history of the business
* List of key company principals

**This section should include:**

* Who the business is and what it stands for
* Your perception of the company’s growth & potential
* Specific goals and objectives of the business
* Background information about the company

**After reviewing this section the reader should know:**

Start here…..

**Definition of the Market**

* Describe your business industry and outlook
* Define the critical needs of your perceived or existing market
* Identify your target market
* Provide a general profile of your targeted clients
* Describe what share of the market you currently have and/or anticipate

**This section should:**

* Basic information about the industry you operate in and the customer needs you are fulfilling
* The scope and share of your business market, as well as who your target customers are

**After reviewing this section the reader should know:**

Start here…..

**Description of Products and Services**

* Specifically describe all of your products and services
* Explain how your products and services are competitive
* If applicable, reference a picture or brochure of your products, which would be included in the plan’s appendix

**This section should:**

* Why you are in business
* What your products and services are and how much they sell for
* How and why your products & services are competitive

**After reviewing this section the reader should know:**

Start here…..

**Organization & Management**

* Provide a description of how your company is organized as well as an organization chart, if available
* Describe the legal structure of your business (proprietorship, partnership, corporation, etc.)
* Identify necessary or special licenses and/or permits your business operates with
* Provide a brief bio description of key managers within the company

**This section should:**

* The legal form of ownership for your business
* Who the leaders are in your business as well as their roles
* The general flow of operations within the firm

**After reviewing this section the reader should know:**

Start here…..

**Marketing and Sales Strategy**

* Identify and describe your market – who your customers are and what the demand is for your products & services
* Describe your channels of distribution
* Explain your sales strategy, specific to pricing, promotion, products and place (4Ps)

**This section should:**

* Who your market is and how you will reach it
* How your company will apply pricing, promotion, product diversification and channel distribution to sell your products and services competitively

**After reviewing this section the reader should:**

Start here…..

**Financial Management**

|  |  |
| --- | --- |
| **This section should include:** | New Business* Estimate of start-up costs
* Projected balance sheet (1 year forward)
* Projected income statement (1 year forward)
* Projected cash flow statement (12 months forward)
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|  | Existing Business* Balance sheets (last 3 years)
* Income statements (last 3 years)
* Cash flow statement (12 months)
 |
|  | If Applying for a Loan* Current personal financial statement on each principal
* Federal tax return for prior year
 |

* Have a good understanding regarding the financial capacity and/or projections for your company

**After reviewing this section the reader should:**

Start here…..

**Appendices**

* Company brochures
* Resumes of key employees
* List of business equipment
* Copies of press articles and advertisements (if available)
* Pictures of your business location and products (optional)
* Information supporting the growth of your industry and/or products (optional)
* Key business agreements, such as lease, contracts, etc. (optional)

**This section should include as attachments:**

Start here…..