

(Your Proposed Company Name)

Business Plan

Latest Revision: (Date)

Prepared by:

Your Name

Your Address

Your City, State Zip

Your cell phone #

Your Home phone #

Your Work phone #

Your email address

Outline of a Business Plan

By SC Small Business Development Center

Preliminary Discussion

The Executive Summary is done last, contains no new information not presented elsewhere, and is no more than ½ to one page. Each of the other sections should be no longer than 2-3 pages maximum.

To develop the plan, start with section II and work toward the end, finishing the Executive Summary last. Skip or delete any sections that don't apply.

Use Arial 12 point bold type for headings. Use Times New Roman 11 or 12 point for text. Do not right-justify. Make paragraphs no longer than 4-6 lines. Leave a blank line between paragraphs. Don't cut and paste the same text to different sections. Avoid repetition.

Remember to clearly state any assumptions, and credit the source of all factual statements.

I Executive Summary

II Company Description

A Legal Name and Legal Form of Business (sole proprietor, partnership, C Corporation, S Corporation, or Limited Liability Company).

B Company's Mission or Objectives

C Names of Top Management with *brief* summary of qualifications.

D Location and Geographic Information

E Company's Development Stage (startup or established company)

F Company's Products or Services

G Specialty Business Information. (Does your company handle specialized, dangerous or environmentally sensitive products? Nuclear? Chemical? Etc.)

III Industry Analysis (National)

A Size and Growth Trends

B Maturity of Industry

C Vulnerability to Economic Factors

D Seasonal Factors

E Technological Factors

F Regulatory Issues

G Supply and Distribution.

H Financial Considerations (Example: “The company will need a \$300,000 initial cash infusion to complete the Market Feasibility & Marketing study. Six months later the company will need \$500,000 to purchase production equipment and bring the product to market.)

IV The Target Market (Local)

A. Demographics

B Lifestyle and Psychographics

C Purchasing Patterns

D Buying Sensitivities

E Size and Trends of Market

V The Competition

A Competitive Position

B Market Share Distribution

C Barriers to Entry

D Future Competition

VI Marketing and Sales Strategy

A Company’s Message

B Marketing Vehicles

C Strategic Partnerships

D Other Marketing Tactics

E Sales Force and Structure

F Sales Assumptions & Prices

VII Operations (Day-To-Day)

- A Plant and Facilities**
- B Manufacturing/Production Plan**
- C Equipment and Technology**
- D Variable Labor Requirements**
- E Inventory Management**
- F Order Fulfillment and Customer Service**
- G Research and Development**
- H Capacity**
- I Quality Control**
- J Safety, Health, and Environmental Concerns**
- K Shrinkage**
- L Management Information Systems**
- M Other Operational Concerns**

VII Management and Organization

- A Principals/Key Employees**
- B Board of Directors**
- C Consultants/Specialists**
- D Management to be Added**
- E Organizational Chart**
- F Management Style & Corporate Climate**

IX Development and Exit Plans

- A Long-Term Company Goals**
- B Growth Strategy**
- C Milestones**

- D Risk Evaluation**
- E Exit Plans**
- X Financial Data (3 years with first year month by month)**
 - A Sources & Uses of Funds (income/expenses prior to opening day)**
 - B Projected Income/Expense Statements**
 - C Projected Balance Statements**
 - D Pro Forma Cash Flow**
 - E Key Ratios**
 - F Breakeven Analysis**
 - G Loan Information (principal, interest, payment schedule, etc.)**
 - H Capital Equipment List**
 - I Explanations (if needed)**
 - J Summary**
- XI Appendix & Supporting Documents**
 - A Resumes of Key Individuals**
 - B Past Three Years of Federal Tax Returns for Key Individuals**
 - C Credit Reports (complete) with Credit Scores for Key Individuals**
 - D Personal Net Worth Statements for Key Individuals.**
 - E Copies of all Agreements, Leases, and/or Quotations and/or Proposals.**
 - F Letters of Intent from Perspective Client/Customers**
 - G Real Estate Plats, Plans, Building Layouts, etc.**
 - H Any Other Documents Needed to Support Your Cause.**