

BUSINESS PLAN TEMPLATE

Business Identification

Business name: _____

Trade name or DBA, if any: _____

Principal business address: _____

Primary contact: _____

Phone and email: _____

Website, if any: _____

Date prepared: _____

1. Executive Summary

Business overview: _____

Mission, goals, and unique value proposition: _____

Leadership and funding summary: _____

2. Company Description

Customer need or problem: _____

Target customers: _____

Business activities: _____

Competitive advantages: _____

Short-term objectives: _____

Long-term objectives: _____

3. Business Structure and Ownership

Business structure: _____

State of formation or registration: _____

Formation or start date: _____

Employer Identification Number, if assigned: _____

Owners and ownership interests: _____

Key management personnel: _____

4. Products and Services

Products or services offered: _____

Customer benefits: _____

Pricing approach: _____

Product or service lifecycle: _____

Intellectual property or research and development: _____

5. Market Analysis

Industry and market: _____

Target market size: _____

Customer research: _____

Market trends: _____

6. Competitive Analysis

Principal competitors: _____

Competitor strengths: _____

Competitor weaknesses: _____

Competitive advantage: _____

SWOT Analysis

Strengths: _____

Weaknesses: _____

Opportunities: _____

Threats: _____

7. Marketing and Sales

Marketing channels: _____

Sales process: _____

Customer retention: _____

8. Operations

Business location and facilities: _____

Operating process: _____

Suppliers and key service providers: _____

Equipment and technology: _____

Staffing plan: _____

Licenses, permits, insurance, and compliance needs: _____

9. Funding Request

Amount requested: _____

Type of funding: _____

Funding period and proposed terms: _____

Use of funds: _____

Future financial plan: _____

10. Financial Projections

Startup or expansion costs: _____

Revenue assumptions: _____

Expense assumptions: _____

First-year monthly or quarterly outlook: _____

Year 2 projection: _____

Year 3 projection: _____

Break-even point: _____

Existing financial history, if applicable: _____

11. Milestones and Risks

Key milestones: _____

Principal risks and responses: _____

12. Supporting Documents

Appendix contents: _____

Prepared and Approved By

Name and title: _____

Signature: _____

Date: _____

This document is provided as a general sample and does not constitute legal advice. Consult a qualified legal professional for advice about your specific situation and the federal, state, and local requirements that may apply.