

marketing

market research
financing
social network

risks

teamwork
Concept

successes

business plan

sales

competition
strategy

entrepreneur

business idea

organisation

chances

balance



planning

profit



Business Plan Template

- Think you have a great idea for a business? That best way to find out whether you do or not is to do your research and write a business plan to see if your idea is feasible. **Susan Ward** wrote about and served small businesses for 20 years. She was also Co-head of Cypress Technologies, an IT consulting business. She has put together a simple business plan template that is laid out beginning at slide 4 - 19.



What is a business Plan?

- A business plan is a formal written document containing business goals, the methods on how these goals can be attained, and the time frame within which these goals need to be achieved. It also describes the nature of the business, background information on the organization, the organization's financial projections, and the strategies it intends to implement to achieve the stated targets. In its entirety, this document serves as a road map that provides direction to the business.



Components to a Business Plan

- A standard [business plan](#) consists of a single document divided into several sections including a description of the organization, the [market research](#), [competitive analysis](#), [sales strategies](#), [capital](#) and labor requirements, and [financial data](#). The resulting document can serve as the blueprint for your business and be supplied to financial institutions or investors if [debt](#) or [equity financing](#) is needed to get your business off the ground.

Title Page



A Really Short, Memorable Tag Line

Business Plan

Month 2019

John Doe, Founder & CEO

ABC Industries, Inc.
1234 Main Street, Suite 567
City, CA 99999

Tel: 650.555.1212
Email: jdoe@example.com
Website: www.example.com

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- Enter your business information including the legal name, address, etc. If you already have a business logo you can add it at the top or bottom of the title page.
- **Business Plan for "Business Name"**
 - Date
 - Business address
 - Phone
 - Email
 - Website
 - If addressing to a company or individual include:
Presented to: "Name"
 - Company or Financial Institution

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Section 1: Executive Summary

- The [executive summary](#) goes near the beginning of the plan but is written last. It provides a short, concise, and optimistic overview of your business that captures the reader's attention and creates a need to learn more. The executive summary should be no more than two pages long, with brief summaries of other sections of the plan.
- Describe your [mission](#) - what is the need for your new business?
- Introduce your company and the management and ownership.
- Describe your main product and service offerings.
- Briefly describe the customer base you will be targeting and how your business will serve those customers.
- Summarize the competition and how you will get market share (i.e., what is your competitive advantage?)
- Briefly outline your financial projections for the first few years of operation.
- Describe your [start-up financing](#) requirements (if applicable).
- An overview of the industry and how your business will compete in the sector. If you need guidance, a [Business Plan Example of the Industry Overview](#) will prove useful.

Section 2: Business/Industry Overview

- Describe the overall nature of the industry, including sales and other statistics. Include trends and demographics, and economic, cultural, and governmental influences.
- Describe your business and how it fits into the industry.
- Describe the existing competition.
- Describe what area(s) of the market you will target and what unique, improved or lower cost services you will offer.

Section 3: Market Analysis and Competition

- In this section, you need to demonstrate that you have thoroughly analyzed the target market and that there is enough demand for your product or service to make your business viable. The competitive analysis includes an assessment of your competition and how your business will compete in the sector. You can turn to [How to Write the Competitor Analysis Section of the Business Plan](#) for help. The [target market](#) description and competitive analysis portions can be two separate sections in the plan or combined as shown:
- Define the target market(s) for your product or service in your geographic locale.
- Describe the need for your products or services.
- Estimate the overall size of the market and the units of your product or service the target market might buy, potential repeat purchase volume, and how the market might be affected by economic or demographic changes.
- Estimate the volume and value of your sales in comparison with any [existing competitors](#). It helps to summarize the results in table form as in the following example which demonstrates that there is a gap in the high-quality sector of the market that your business intends to target.
- Describe any helpful barriers to entry that may protect your business from competition, such as access to capital, technology, regulations, employee skill sets, location, etc.

Section 3: Market Analysis and Competition - continued

Business	Competitor A	Competitor B	Your Business
Est. Annual Revenue	\$1,000,000	\$600,000	\$500,000
Employees	20	10	5
Price	Average	High	High
Quality	Low	Average	High

Section 4: Sales and Marketing Plan

- A description of how you intend to entice customers to buy your product(s) or service(s), including advertising/promotion, [pricing strategy](#), sales and distribution, and post-sales support if applicable.
- **Product or Service Offerings**
- Describe your product or service, how it benefits the customer, and what sets it apart from competitor offerings (i.e., what is your [Unique Selling Proposition](#)?).
- **Pricing Strategy**
- Describe how you intend to price your product or service. Pricing has to be competitive to attract customers but high enough to cover costs and generate a profit. Pricing can be based on markup from cost, value to the buyer, or in comparison with similar products/services in the marketplace. [Breakeven analysis](#) can help determine sales and pricing for profitability. You'll also want to take a look at [Retail Pricing Strategies to Increase Profitability](#).

Section 4: Sales and Marketing Plan - continued

- **Sales and Distribution**
- Describe how you will distribute your products to the customer (if applicable). Will you be selling wholesale or retail? What type of packaging will be required? How will the product(s) be shipped? What methods will be used for payment?
- **Advertising and Promotion**
- List the different media you will use to get your message to customers (e.g., [business website](#), email, [social media](#), traditional media like newspapers, etc.). Will you use [sales promotional](#) methods such as free samples, product demonstrations, etc.?
- What marketing materials you'll use such as [business cards](#), flyers, [brochures](#), etc. What about product launches and [tradeshows](#)? Include an approximate budget for [advertising](#) and promotion.

Section 5: Ownership and Management Plan

- This section describes the legal structure, ownership, and (if applicable) the management, and staffing requirements of your business.
- **Ownership Structure**
- Describe the legal structure of your company (e.g., corporation, partnership, [Limited Liability Company](#), or [sole proprietorship](#)). List ownership percentages if applicable. If the business is a sole proprietorship this is the only section required.
- **Management Team**
- Describe managers and their roles, key employee positions, and how each will be compensated. Include brief resumés.

Section 5: Ownership and Management Plan - continued

- **External Resources and Services**
- List any external professional resources required, such as [accountants](#), lawyers, [consultants](#), etc.
- **Human Resources**
- List the type and number of [employees or contractors](#) you will need and an estimate of the salary and benefit costs of each.
- **[Advisory Board](#) (if required)**
- Include an [advisory board](#) as a supplemental management resource (if applicable).

Section 6: Operating Plan

- The operating plan outlines the physical requirements of your business, such as office, warehouse, retail space, equipment, inventory and supplies, labor, etc. For a one-person, [home-based](#) consulting business the operating plan will be short and simple, but for a business such as a restaurant or a manufacturer that requires custom facilities, supply chains, specialized equipment, and [multiple employees](#), the operating plan needs to be very detailed.
- **Development (if applicable)**
- Explain what you have done to date in terms of identifying possible locations, sources of equipment, [supply chains](#), etc. Describe your production workflow.
- **Production**
- For manufacturing, explain how long it takes to produce a unit and when you'll be able to start producing your product or service. Include factors that may affect the time frame of production and how you'll deal with potential problems such as rush orders.

Section 6: Operating Plan - continued

- **Facilities**
- Describe the physical location of the business including location, land, and building requirements. Include square footage estimates with room for expansion if expected. Include the [mortgage or leasing costs](#). Also include estimates of expected maintenance, utilities, and related [overhead costs](#). Include zoning approvals and other permissions necessary to operate your business.
- **Staffing**
- Outline expected staffing needs and the main duties of staff members, especially the key employees. Describe how the employees will be sourced and the employment relationship (i.e., [contract](#), full-time, part-time, etc.). Detail any employee training needed and how it will be provided.
- **Equipment**
- Include a list of any specialized equipment needed. Include the cost and whether it will be leased or purchased and the sources.
- **Supplies**
- If your business is manufacturing, retail, food services, etc. include a description of the materials needed and how you will reliably source them. Give descriptions of major suppliers if needed. Describe how you will manage inventory.

Section 7: Financial Plan

- The financial plan section is the most important section of the business plan, especially if you need debt financing or want to [attract investors](#). The financial plan has to demonstrate that your [business will grow](#) and be [profitable](#). To do this, you will need to create projected income statements, [cash flow](#) statements, and balance sheets. For a new business, these are forecasts. A good rule of thumb is to underestimate revenues and overestimate expenses.
- **Income Statements**
- The income statement shows your projected revenues, expenses and profit. Do this on a monthly basis for at least the first year for a startup business.
- **Cash Flow Projections**
- The cash flow projection shows your monthly anticipated cash revenues and disbursements for expenses. It is important for demonstrating that you can manage your [cash flow](#) and will be a good credit risk.

Section 7: Financial Plan - Continued

- **Balance Sheet**
- The [balance sheet](#) is a snapshot summary of the [assets](#), liabilities, and equity of your business at a particular point in time. For a startup, this would be on the day the business opens. Note that a new business will have no accounts receivable entries on the balance sheet. Note also that the Balance Sheet is much simpler for unincorporated businesses without employees. Income tax, pensions, medical, etc. are only applicable to incorporated businesses, as are earnings/retained earnings.
- **Breakeven Analysis**
- Including a breakeven analysis will demonstrate to financiers or investors what level of sales you need to achieve to make a profit.

Section 8: Appendices and Exhibits

- The appendices and exhibits section contains any detailed information needed to support other sections of the plan.
- **Possible Appendix/Exhibit Items**
- Credit histories for the business owners
- Detailed market research and analysis of competitors
- Resumés of the owners and key employees
- Information about your industry
- Information about your products/services
- Site/building/office plans
- Copies of mortgage documents, equipment leases, etc. (or quotes on these)
- Marketing brochures and other materials
- References from business colleagues
- Links to your [business website](#)
- Any other supporting material that may impress potential lenders or investors if you are looking for financing

No Universal Business Plan

- There are various template that can be used. The business plans serves two purpose for you: 1. To help you truly understand your business in a truthful manner, 2. To help any investors, business partners, financial institutions, etc. have a solid understanding of your business.
- I used the template by the Small Business Administration since I was registering my business with them. Quick excerpt of my title page and executive summary are on the next slide.



My Business Plan

- **BUSINESS PLAN**

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- **BBV2M-BROTHERS BROOKS VISION 2 MISSION LLC**

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- **Brooks Rodney D, Owner**

- **July 3, 2015**

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- **1. EXECUTIVE SUMMARY**

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- **1.1 Product**

-

- Our business model for BBV2M has three major components to it: 1) Helping; 2) Writing; 3) Consulting and Merchandising.

- **HELPING** - Our helping efforts are centered around our nonprofit initiatives in helping the homeless through our "We Care Program and informational campaign that is targeted to be the bridge to help individuals find assistance with churches, civic organizations and government entities; as well as our awareness campaigns that is spearheaded through our website, physical literature and social media accounts. Another element of our helping efforts is to also partner with churches, civic organizations and government entities to help in the area human relations assistance i.e.

- **WRITING** - Our principal products in this area will be our books and self-help material for sale. There are currently two main novels, two self-help, and one novel book that has been written: 1) A documentary type novel on the homeless called The Millipede Effect 2) A social consciousness book

- **CONSULTING** - Our consulting will be in the areas Motivation, Human Relations, and behavioral psychology. Our motivation will consist of our speaking to schools and youth organizations, Human Relations consulting will consist of assessing, developing, and consulting with organization both profit and non-profit as well as

- **MERCHANDISING** - Our merchandising connects to our branding of our logo, which are our registered trademarks with the U.S. Patent and Trademark office. All the above activities from non-profit activities to consulting will have our logo attached to it. Our shirt designs, cups, and hats that we sell



E.W.

Entrepreneur's World

Entrepreneur's World