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**Business Plan Template**

Courtesy of **@stevenfies**

Based on my book, *24-Hour Business Plan Template*

**Find more information at** [**stevenfies.com**](http://www.stevenfies.com/)**.**

# Plan Summary

1. Cover Page
2. Executive Summary
3. Company Objectives
4. Products & Services
5. Customer Analysis
6. Competitor & Industry Analysis
7. Sales & Marketing Strategy
8. Operations & Logistics
9. Management Structure
10. Business Capitalization
11. Financial Plan

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(Your logo here ^)

# Executive Summary

(Your summary here)

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Remember to include:

* The **names of the owners** of the business.
* The **location**(s) of the business.
* **Startup capital required** to launch, and a brief description of how it will be used.
* A **rough timeline** for the business – estimated launch date, growth milestones, and a brief description of what things look like a few years down the road.

# Company Objectives

* **Mission Statement**
	+ (Your text goes here)
* **Guiding Principles**
	+ (Your text goes here)
* **Owners & Legal Structure**
	+ (Your text goes here)
* **Industry**
	+ (Your text goes here)
* **Brief Review of Products, Services, & Customer Profile**
	+ (Your text goes here)
* **Primary Business Objectives**
	+ (Your text goes here)
* **Consolidated Financial Forecast**
	+ (Your text goes here)

# 4. Products & Services

**Product/Service #1**

* **WHAT** is it?
* **WHO** will buy it?
* **WHY** will they buy it?
* **WHEN** will they use it?
* **WHERE** will it be used?
* **HOW** does it stack up against market substitutes (competing products)?

**Product/Service #2**

* **WHAT** is it?
* **WHO** will buy it?
* **WHY** will they buy it?
* **WHEN** will they use it?
* **WHERE** will it be used?
* **HOW** does it stack up against market substitutes (competing products)?

# 5. Customer Analysis

* Who is your customer?
* Demographic profile (age, location, interests, etc.)?
* Where do your customers get information about products and services like yours?
* Where is your average customer employed? Be specific – include the type of industry they work in, if applicable, along with their job title and function.
* What does your customer do in their free time?
* What guiding principles, beliefs, and values does your customer hold?
* Describe the average day in the life of your customer.

# 6. Competitor & Industry Analysis

**Industry Analysis**

* 1. **Market Size** ($) –
	2. **Market Growth** –
	3. **Market Demand** –
	4. **Market Trends** –
	5. **Barriers to Entry** –

**Competitor Analysis**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **YOU** | **Competitor #1** | **Competitor #2** |
| **Products** |  |  |  |
| **Price** |  |  |  |
| **Customer Svc** |  |  |  |
| **Comp Advantages** |  |  |  |
| **C. Disadvantages** |  |  |  |
| **Market Share** |  |  |  |
| **Customer Loyalty** |  |  |  |

# 7. Sales & Marketing Strategy

Graphically show your sales/marketing funnels here:

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**List Marketing Costs**

* Lead & Market Research –
* Graphic Design –
* A/B Experimentation –
* Media Production –
* Web Optimization & SEO –
* Hard Costs charged by advertisers to run your ad –
* Trade Show Exhibitor Fees –

**List Sales Costs**

* CRM Software (like SalesForce) –
* Cell Phone and/or Company Car (for outside sales) –
* Prospecting Lists –
* Training (if you’re hiring newbies) –
* Trade Show Exhibitor Fees –
* Fun Company Events, Bonuses, and Incentives (to keep salespeople motivated) –

***Sales & Marketing Data Table***

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Cost/Month** | **Expected ROI** | **Time to Build** |
| **Niche Magazine Ad** |  |  |  |
| **Online PPC Campaign** |  |  |  |
| **Outbound Sales Calls** |  |  |  |
| **Content Marketing** |  |  |  |
| **Etc.** |  |  |  |

# 8. Operations & Logistics

1. **Production**
	1. Raw Materials –
	2. Suppliers –
	3. Quality Control –
	4. Production Methods –
	5. Inventory Management (if applicable) –
2. **Staff**
	1. Job Descriptions –
	2. Hiring Strategy –
	3. Compensation –
	4. Organizational Structure –
	5. Company Procedures –
	6. Schedules –
3. **Legal**
	1. Licenses and Permits –
	2. Conformity to Government Regulations –
	3. Insurance –
	4. Workplace Laws – such as OSHA –
	5. Intellectual Property –
	6. Legal Advice –
4. **Financial**
	1. Accounting Methods –
	2. Reporting Requirements –
	3. Tax –
	4. Establishment of Company Financial Accounts –
	5. Company Credit Policies –
	6. Management of Accounts Receivable and Payable –
	7. Accountant/CPA –

# 9. Management Structure

Discuss structure here, being sure to include/list the following:

* Owners
* Board of Directors
* C-Level Executives (CEO, CFO, COO)
* Managers
* Supervisors
* Attorney
* Accountant
* Investors Advisors
* Business Consultants
* Financial Advisors

Show org chart here:

# 10. Business Capitalization

List business capitalization source(s) here.

* Source 1 – Amount of Capital
* Source 2 – Amount of Capital
* Etc.

List all startup costs here:

* **Business Registration & Licensing**
* **Professional Legal & Financial Advice and Assistance**
* **Communications & Network Expenses** (Internet, Phones…)
* **Location: Rent, Water, Utilities, Garbage**
* **Web Hosting, Design, and Development**
* **PP&E – Property, Plant, and Equipment**
* **Initial Inventory**
* **Insurance & Bonding**
* **Logo Design, Marketing Materials**
* **Starting Payroll**
* **Miscellaneous Expenses**

# 11. Financial Plan

**Business Financial Plan**

1. Financial Snapshot upon Launch
2. 1-Year Profit Projection
3. 5-Year Profit Projection
4. Estimated Cash Flow

**Personal Financial Plan**

1. Current personal assets/net worth
2. Current personal liabilities/debts
3. Current financial situation/sustainability plan
4. Estimated Cash Flow (Personal)