

(Title Page)

# **BUSINESS PLAN**

**Title of Business Plan (optional)**

## **COMPANY NAME**

(Address)

**CONTACT: (Your Name and Title)**

**TELEPHONE:**

**FAX:**

**EMAIL:**

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# EXECUTIVE SUMMARY

## Introduction

NAME COMPANY was founded in 20\_\_ as a -- corporation /partnership /limited partnership /sole proprietorship /other? Located in NAME CITY, Company -- provides /manufacturers -- and markets NAME & CLASSIFY PRODUCT OR SERVICE. The product/service is/will be sold BRIEFLY DESCRIBE SALES/DISTRIBUTION METHOD. Our market scope potentially encompasses NAME WIDEST POSSIBLE MARKETPLACE.

Company is owned by NAME PRINCIPALS. Each principal holds \_\_% of the equity/assets.

Company is now seeking -- a strategic partner contributing resources and skills /investment capital of \$\_\_ /a loan of \$\_\_ for \_\_ years/a \$\_\_ line of credit /other? -- needed to -- start-up and become operational /complete product development /launch product/service in the marketplace /implement our marketing plan /build the business to the next level /other?

Combined with -- owners' cash investment of \$\_\_ /owners' resources and skills -- the collaboration/infusion would provide the -- collective skills and resources /working capital and cash reserves /growth capital /other? -- needed to produce revenues with positive cash flow and excellent returns within one/two/three years.

## Product/Service Concept

NAME PRODUCT/SERVICE is a DESCRIBE CONCEPT (UNIQUE FEATURES, ADVANTAGES, PRICE). Product/Service uniquely satisfies market demand for DESCRIBE KEY BENEFITS OF PRODUCT/SERVICE TO THE CUSTOMER.

[Services Contract](#)

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## Target Market

Our target market consists of BRIEFLY DEFINE TARGET MARKET. This niche provides immediate marketing opportunity, and according to -- industry experts /business media /other? -- it will grow steadily/rapidly for the foreseeable future.

## **Competitive Position**

This niche currently is -- without recourse to /underserved by /dissatisfied with -- alternative offerings. This is mainly due to -- scarcity of participants in this new field /competitors' inconsistent product quality /competitors' outmoded product features /competitors' high pricing /competitors' indifferent customer service /competitors' spotty product availability /competitors' slow delivery /competitors' lack of environmental correctness /other?

Research indicates that this niche is primed to accept our offering because of -- its advanced features /its lower price /its superior quality and value /our emphasis on customer service and satisfaction /other?

## **Goals and Objectives**

We have already -- identified a viable market niche /produced a prototype /applied for patents /filed trademarks /established distribution channels /launched a marketing communications program /begun to develop sales /other?

Within \_\_\_ months, we intend to DESCRIBE SHORT-TERM GOALS AND OBJECTIVES.

Within \_\_\_ year(s), we expect to DESCRIBE MID-TERM GOALS AND OBJECTIVES.

Within five years, we expect to DESCRIBE 5-YEAR GOALS AND OBJECTIVES.

To attain these milestones, we will creatively employ the lean, flexible operating and production methods set forth in this business plan.

We will continuously monitor the market to gain knowledge needed to improve our products/services and develop follow-ons. We plan to launch the following products/services over the next \_\_\_ months/years.

LIST PRODUCTS/SERVICES

## **Management**

Company is/will be managed by NAMES & TITLES. The team, whose -- talents /skills /capital - and hard created this opportunity, combines the knowledge and know-how as well as the commitment it will take to successfully manage this opportunity.

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**Contract of Employment**

## **Summary of Financial Projections**

Detailed financial assumptions and projections are included at the end of this document. The following summary indicates that Company fully expects to -- be able to service its obligations /offer good returns /other?

-----

	Year	-1	-2	-3	-4	-5
Revenues:						
Earnings:						
Current Ratio:						
Quick Current Ratio:						
Return On Investment:						

[Confidentiality Agreement](#)

# **OPERATIONS & PRODUCTION**

## **Location, Facilities, Equipment**

Company's head office -- and showroom /main store /plant /warehouse /distribution center /workshop /studio /restaurant /other? -- is/will be located at NAME CITY/CITIES AND STATE(S)/PROVINCE(S).

For the present, we have -- leased /taken an option on /other? -- a \_\_\_ sq. ft. space in a -- private /commercial/ high profile /secure /fireproof /other? -- residence /office building /factory building /store front /other? It is situated in -- a suburban neighborhood /a high traffic shopping mall /a well serviced industrial park /other? This location offers good access to -- customers /strategic partners /suppliers /a distribution hub /skilled labor /low cost labor /transportation /other?

At -- virtually zero cost /only \$\_\_ per month/year -- including/plus utilities, this location is extremely cost-efficient for the near term and provides the added benefit of being -- sufficient /expandable -- to meet our needs for the next \_\_\_ years.

We plan to/We currently -- lease/purchase -- the following equipment. We will lease/purchase additional equipment as needed to manage growth.

### EQUIPMENT:

Capital Equipment (itemize)

Automobiles/Trucks

Computers

Office Equipment and Furniture

Others?

## **Management Team**

Company's overall direction, long-term goals and financial policy will be determined by our management team, acting with advice from strategic partners and professional advisors.

The management team also will perform key, day-to-day operating and marketing tasks. In addition, they will coach quality circles devoted to product or process improvements and marketing. Quality circles will take the form of virtually continuous communications among all of the team members, who are as follows:

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**President-Employment Contract**  
**President-Job Description**

President and Chief Executive Officer  
Mr./Ms. Name Name, Degrees

Experience: BRIEFLY OUTLINE BACKGROUND AND SKILLS.

Tasks: OUTLINE DUTIES

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**Vice-President-Employment Contract**  
**Vice-President- Job Descriptions:**  
**VICE PRESIDENT OF FINANCE AND ADMINISTRATION**  
**VICE PRESIDENT OF PRODUCTION AND OPERATIONS**  
**VICE PRESIDENT SALES AND MARKETING**  
**Vice President of Human Resources**

Vice President Finance (CFO)  
Ms./Mr./Dr. Name Name, Degrees

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.

Tasks: OUTLINE DUTIES

Vice President Operations

Mr./Ms. Name Name

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.

Tasks: OUTLINE DUTIES

Chief Information Officer (CIO)

Ms./Mr. Name Name

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.

Tasks: OUTLINE DUTIES

Vice President Marketing

Mr./Ms. Name Name

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.

Tasks: OUTLINE DUTIES

Vice President Sales

Ms./Mr. Name Name

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.

Tasks: OUTLINE DUTIES

Vice President R&D

Ms./Mr. Name Name

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.



Tasks: OUTLINE DUTIES

Vice President Manufacturing/Production

Mr./Ms. Name Name

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.

Tasks: OUTLINE DUTIES

Vice President Human Resources

Mr./Ms./Dr.

Qualifications: CAREER HIGHLIGHTS, ACHIEVEMENTS, SPECIAL SKILLS.

Tasks: OUTLINE DUTIES

Other?

## **Core Employees**

The management team is/will be supported by a core group of \_\_\_ trained and motivated people, described in the following table. This core group will expand as required to manage growth.

POSITION

NUMBER OF PEOPLE

Sales clerk(s)

Machine operator(s)

Office manager

Receptionist

Others?

## **Strategic Partners**

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**LIMITED PARTNERSHIP AGREEMENT**  
**PARTNERSHIP AGREEMENT**

In the interests of flexibility, speed, and minimum short-term use of cash, Company will work through joint ventures with companies selected for their complementary resources and skills.

We --have already begun to /plan to -- forge strategic partnerships with the following companies/types of companies.

Name/Type of company:

Products or services provided:

Years in business:

Terms: --revenue-sharing /deferred payment /other?

Location:

Principal contact:

Telephone:

Email:

REPEAT ABOVE FOR EACH PARTNER

**Professional Advisors**

Management has engaged/will engage the services of the following firms.

**Legal Counsel:**

Name of firm:

Principal contact:

Address:

Telephone:

Email:

Terms of arrangement: -- retainer of \$\_\_ per month /hourly rate of \$\_\_\_ /other?).

**Accountant:**

Name of firm:

Principal contact:

Address:

Telephone:

Terms of arrangement: -- retainer of \$\_\_ per month /hourly rate of \$\_\_\_ /other?).

**Production**

Company's production process integrates a variety of internal and external activities, which fall into the following areas:

- (1) Market Research
- (2) Product/Service Development
- (3) Manufacturing/Production
- (4) Customer Service

For maximum efficiency, all of these operations are geared to take place virtually concurrently, rather than linearly.

The key to our concurrent production process will be Coordination, Cooperation, and Communication among all participants in the process. Our "3C" strategy will work because all participants will sign on as team players from the start, and will be trained and motivated. The process consists of the following activities.

- (1) Market Research

**MANDATE:**

Determine which products/services and follow-ons the market is ready for; establish quality and cost parameters; evaluate positioning, packaging and marketing communications; continually monitor the market and reduce risk of substitution by competitors/new technologies.

**METHODS:**

A wealth of market information will be provided regularly by strategic partners up and down the chain.

We will monitor industry media.

We will attend trade shows and talk with vendors and potential customers.

We will visit points of sale and talk with merchants and shoppers.

We will distribute questionnaires -- in-pack with warranty-registration form /at points of sale /at trade shows /other?

Customers will be called/emailed on a regular basis to monitor their satisfaction.

Focus groups will be conducted to evaluate product/service concepts and marketing communications.

## (2) Product/Service Development

MANDATE:

Source suppliers of equipment /raw materials /services; establish supply, production and delivery schedules; design, produce and test prototypes; prove feasibility.

## (3) Manufacturing/Production:

MANDATE:

Set production schedules; source equipment/subcontractors; hire and train work teams; implement production process and measure quality; manage inventory.

## (4) Customer Service:

MANDATE:

Minimize Returns and Adjustments by developing and implementing delivery and aftercare programs geared for maximum customer satisfaction.

DELIVERY:

Shipping will be via DESCRIBE METHOD(S)

Order-taking will be speedily processed by DESCRIBE METHOD(S)

Payment will be -- \_\_\_-day terms /COD /letters of credit /monthly retainer /other?

CUSTOMER SERVICE PROGRAMS:

Technical support consisting of DESCRIBE

Customer/Reseller training consisting of DESCRIBE

Field service consisting of DESCRIBE

Guarantees/Warranties consisting of DESCRIBE

Other?

# MARKET & COMPETITIVE ANALYSIS

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### Market Overview

Our market is based on NARROWLY CLASSIFY YOUR PRODUCT/SERVICE SEGMENT, selling in the range of \$ \_\_\_ to \$ \_\_\_ per unit /hour /other? Annual sales are estimated at \$ \_\_\_.

According to our research, the market has been growing rapidly /steadily for the past \_\_\_ years/months. This trend is attributed to -- new technology /changing lifestyles /environmental concerns /aging population /new customers entering the market /other? Industry experts predict that the trend will continue for at least the next \_\_\_ years, as this market is currently in the early/growth stage of its life cycle.

Participants in this market sell -- through standard distribution channels /by direct response marketing /via personal sales visits /over the counter /other?

DISTRIBUTION THROUGH RESELLERS/CATALOGS:

Figure 1 shows the main distributors/catalogs serving the market.

Fig. 1

DISTRIBUTORS/CATALOGS:

NAME

NAME

NAME

Others?

Figure 2 shows the stores/markets served by these distributors/catalogs .

Fig. 2

STORES/MARKETS                      NUMBER OF STORES/MARKET SIZE

NAME                                      \_\_\_?

NAME                                      \_\_\_?

NAME                                      \_\_\_?

Others?

DIRECT SALES TO END USERS:

Participants in this market sell direct via -- company sales force /manufacturer's reps /direct response marketing /over the counter /trade shows /crafts fairs /other?

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[\*\*BULK SALES AGREEMENT\*\*](#)

[\*\*CONTRACT FOR SALE OF GOODS\*\*](#)

[\*\*EXCLUSIVE DISTRIBUTORSHIP AGREEMENT\*\*](#)



NEW PARTICIPANTS

A number of new participants have entered this market in the past \_\_\_ months/quarters/years.

Successful newcomers have gained market share from -- the major players /all participants /an expanding market base /other?

Our research indicates that those who have succeeded did so primarily through -- new technology /better product features or quality /superior customer service /aggressive pricing /aggressive advertising and promotions /strong dealer support /breadth of line /rapid introduction of follow-ons /other?

The market is currently shared by approximately \_\_ participants. The key participants are shown in Figure 3 below.

Fig. 3

COMPANY	SALES (est.)	MARKET SHARE (est.)
NAME	\$__	__%
NAME	\$__	__%
NAME	\$__	__%
Others?		

Figure 4 shows the share-gain and -loss trends among the key participants over the past \_\_ months/years.

Fig. 4:

COMPANY	SHARE CHANGE (est.)
NAME	+ __% / - __%
NAME	+ __% / - __%
NAME	+ __% / - __%
Others?	

Figure 5 shows key participants' brands.

Fig. 5

COMPANY	BRAND
NAME	BRAND
NAME	BRAND
NAME	BRAND
Others?	

Figure 6 shows average unit pricing for the leading brands.



Fig. 6

	WHOLESALE	MSRP	AV. STREET PRICE
BRAND	\$__	\$__	\$__
BRAND	\$__	\$__	\$__
BRAND	\$__	\$__	\$__
Others?			

Figure 7 shows the product/service positioning of the leading brands.

Fig. 7

BRAND  
POSITIONING:

BRAND  
POSITIONING:

BRAND  
POSITIONING:

Others?

## **Competitive Strengths and Weaknesses**

The following table highlights the primary strengths and weaknesses of our key competitors.

COMPANY/BRAND:

STRENGTHS: -- experience in the market /positive brand recognition (image/reputation) /large customer base /large marketing budget /aggressive consumer advertising and promotions /aggressive trade advertising and promotions /strong dealer support /good product availability /broad distribution /breadth of line /rapid introduction of follow-ons /relevant positioning

(specify) /aggressive pricing /high quality for price (value) /environmentally progressive /innovative technology /unique features (specify) /aesthetics (specify) /ease of use /reliability /ease of maintenance /durability /friendly competent customer service /unique shopping experience /other?

WEAKNESSES: -- HIGHLIGHTS

COMPANY/BRAND:

STRENGTHS: -- HIGHLIGHTS

WEAKNESSES: -- HIGHLIGHTS

COMPANY BRAND:

STRENGTHS: -- HIGHLIGHTS

WEAKNESSES: -- HIGHLIGHTS

Others?

## **Our Strengths and Weaknesses**

The following highlights the strengths and weaknesses of our product/service.

YOUR COMPANY/BRAND

STRENGTHS: -- large market niche /few competitors /uniquely relevant positioning based on - innovative technology /powerful features /lower pricing /environmental relevance /unique shopping experience /other? - resulting in - instant gratification /money savings /greater chance of success /ease of use /ease of maintenance /fast payback /other?) - and supported by - aggressive pricing strategy /aggressive consumer advertising and promotions /aggressive trade advertising and promotions /other?

WEAKNESSES: -- HIGHLIGHTS

## **Conclusions**

The preceding analysis supports our test market/focus group experience -- and reinforces our confidence that a significant portion of our target market will accept NAME YOUR BRAND/PRODUCT/SERVICE.

While we recognize certain weaknesses, we believe these will be successfully overcome /compensated for by SUMMARIZE YOUR BRAND'S COMPETITIVE ADVANTAGES AND UNIQUE CUSTOMER BENEFITS.

We expect to capture market share from existing competitors /from new customers entering the market /other?

Aggressive marketing, coupled with continual product improvement and rapid introduction of follow-ons, will allow us to quickly gain a foothold in our initial market(s) and make inroads into new markets in measured stages.

## **MARKETING PLAN**

### **Target Market**

Our target market consists of --

IF YOU SELL CONSUMER PRODUCTS, CLASSIFY THE END USER BY ANY/ALL OF THE FOLLOWING MEANS.

DEMOGRAPHICS: -- FOR EXAMPLE -- Upper-income boomers /Lower-income inner-city teens /Wealthy rural older couples /Middle-income suburban homeowners /Better educated upper-income young urban professionals /Other?

PSYCHOGRAPHICS/SOCIOGRAPHICS: -- FOR EXAMPLE -- Early adapters /Joiner-activists /Passive followers /Status seekers /Peer group leaders /Free and independent spirits /Other?

CHARACTERIZATION: -- FOR EXAMPLE -- Soccer moms /blue color sports buffs /Sunbelt golden-agers /Computer geeks /Greenies /"Madonna" (free and independent females aged 12 to 19) /"Armani" (trendy, status-conscious upper-income males aged 25 to 49 /"L. L. Bean" (casual, quality-conscious, upper-middle income males and females aged 25-49/ Other?

The decision maker is -- FOR EXAMPLE -- Working mom, average age 28, head of household with school-aged children and limited time for preparing meals.

IF YOU SELL BUSINESS-TO-BUSINESS, CLASSIFY THE TARGET BUSINESS BY TYPE, SIZE, LOCATION. CLASSIFY THE DECISION MAKER BY TITLE, JOB MANDATE, PURCHASING POWERS. -- FOR EXAMPLE -- Small to medium sized snack bars and restaurants in the upstate area. The decision maker is the owner; it is up to the owner which suppliers to buy from.

## **Product/Service Positioning**

Our product/service/line will be positioned in the marketplace as follows:

POSITION WHAT YOU SELL BASED ON ITS UNIQUE BENEFITS TO THE CUSTOMER RESULTING FROM ITS UNIQUE FEATURES /QUALITY /PRICING, ETC. -- FOR EXAMPLE: "Low-Fat Gourmet Taste and Gourmand Satisfaction at a Mainstream Price." Low-Fat is based on the exclusive use of trout, which has 30 percent of the fat content of salmon and haddock. Gourmet taste is attributed to the fish being trout, which is widely regarded as a gourmet taste, and the variety of "international" sauces we have developed. Mainstream price is based on price being competitive with popular brands; competitive pricing is practical thanks to the efficient methods used at our state-of-the-art trout farm and processing plant."

Our test market/focus group research reinforces our confidence that our target market will respond positively to this positioning, which will be the focus of sale of all marketing communications.

## Pricing Strategy

The product/service will be priced as follows. Prices are based on one average unit equal to  
DEFINE AVERAGE UNIT IN TERMS OF PIECES, TIME, WEIGHT, ETC.

	WHOLESALE	MSRP	AV. STREET PRICE
BRAND	\$__	\$__	\$__

REPEAT ABOVE FOR EACH OF YOUR PRODUCTS/SERVICES

This pricing strategy results in an average gross margin of \_\_%. In the marketplace, this price represents -- better value than leading competitor /other?



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## Sales & Distribution Strategy

STANDARD DISTRIBUTION CHANNELS:

The product/service will reach end users in retail outlets served by the following distributors.

DISTRIBUTOR	MARKET SERVED
NAME	NAME
NAME	NAME
NAME	NAME
Others?	

These distributors serve the following retail chains/outlets.

CHAIN/OUTLET

TOTAL STORES

NAME

---

NAME

---

NAME

---

Others?

Distributor accounts will be developed and managed by -- senior management /an experienced sales manager /manufacturer's representatives /other? We plan to make initial contact -- via personal sales visits /telephone /email /at trade shows /PR in trade media /advertising in trade magazines /other.

We will support sales by participating as much as possible in distributors' and retailers advertising and sales promotions programs, and by providing the following POS advertising materials and selling tools.

POS MATERIALS AND SELLING TOOLS:

Window signs

Shelf talkers

Posters

Merchandisers (product displays)

Mobiles

Brochures

Catalogs

Demonstration units

Ad slicks

Others?

DIRECT RESPONSE MARKETING:

We have decided to sell direct in order to save the time and cost of developing a distributor network and quickly gain a measurable response to our product/service offer. Activities will include -- PR in targeted media /telemarketing to rented lists /direct mail to rented lists /coupon advertising in NAME MEDIA /Internet marketing via Company's Web site /others?

## ORIGINAL EQUIPMENT MANUFACTURERS

All/Most of our sales will be to OEMs. These large operations generally have their own sales and marketing infrastructures and would market our product(s) under their own brand names. OEMs actively look for new products and licensing opportunities. The lower margin is compensated by higher volume and savings in marketing costs.

We have --identified /contacted /entered into negotiations with -- the following OEMs.

COMPANY NAME	BRAND NAME
COMPANY NAME	BRAND NAME
COMPANY NAME	BRAND NAME

Others?

Sales cycles are normally slow with OEMs due to the levels of approval and negotiating time. We estimate cycles of several weeks/months.

## **Customer Service Strategy**

Customer satisfaction is of utmost importance to us. Customer support and aftercare programs will include--technical support (specify) /guaranteed spare parts delivery /training programs (specify) /other? As is standard in our industry, returns and adjustments will be offered on the basis of SPECIFY.

## **Market Development Strategy**

We plan to develop the market in measured stages. The following table shows our market rollout schedule.

MARKETS:	Year	-1	-2	-3	-4	-5
----------	------	----	----	----	----	----

NAME MARKET	X	X	X
NAME MARKET		X	X
NAME MARKET			X
Others?			

## **APPENDIX: Financial Projections\***

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[Twelve-Month Cash Flow](#)

[Twelve Month Profit and Loss Projection](#)

[Twelve Month Sales Forecast](#)

[Four Year Profit Projection](#)

[Breakeven Analysis](#)

[Opening Day Balance Sheet](#)

[Personal Financial Statement](#)

[Projected Balance Sheet](#)

[Startup Expenses](#)