

**[Company Logo]**

(if applicable)

**[Company Name] BUSINESS PLAN  
[Current Month], [Year]**

**[Name]**

**[Title]**

**[Company Name]**

**[Address 1]**

**[Address 2]**

**[City, State Zip]**

**Tel: [ ]**

**Fax: [ ]**

**Email: [ ]**

**Website: [ ]**

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# **I. Executive Summary**

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## **Key Questions to Answer:**

- *What does your business do?*
- *What market need does your business solve?*
- *What are 4-7 reasons why your business will be successful?*
- *How much capital, if any, are you seeking for your business?*

## **II. Company Overview**

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### ***Company Profile***

- *Where are you located?*
- *When were you formed?*
- *What is your legal entity form?*

### ***Company Vision/Mission Statement***

- *What goals is your company trying to achieve?*

### ***Past Accomplishments***

- *What successes has your company already achieved?*

## **III. Industry Analysis**

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### ***Market Need***

- *What customer need are you fulfilling?*

### ***Market Fundamentals***

#### **Market/Industry Overview**

- *In what market(s) do you compete?*

#### **Market/Industry Trends**

- *What are the key market trend(s) and how does that effect you?*

#### **Relevant Market Size**

- *How large is your relevant market (the # of customers who can realistically buy from you)?*

### ***Unique Qualifications***

- *What qualifications make your business uniquely qualified to succeed)?*

## **IV. Customer Analysis**

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### ***Customer Needs***

- *What are the key needs of your target customers?*

### ***Target Customer Profile***

- *Who are your target customers? Give a detailed demographic profile.*

## **V. Competitive Analysis**

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### ***Direct Competitors***

- *Who are your direct competitors? What are their strengths and weaknesses?*

### ***Indirect Competitors***

- *Who are your indirect competitors? What are their strengths and weaknesses?*

### ***Competitive Advantage***

- *What are your competitive advantages? Are these sustainable (can competitors emulate them)?*



## **VI. Marketing Plan**

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### ***Products and Services***

- *What are your products and/or services?*

### ***Branding and Promotions Plan***

- *What is your desired brand positioning? How do you plan to promote your company's products and/or services?*

### ***Distribution Plan***

- *How will you sell your products and/or services to customers? Directly? Through partners/distributors? Etc.*

## **VII. Operations Plan**

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### ***Key Operational Processes***

- *What are the key operational processes that your organization needs to accomplish on a daily basis to achieve success?*

### ***Business Milestones***

- *What milestones will you need to accomplish over the next 1-3 years in order to achieve success?*

## **VIII. Management Team**

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*The Management Team section of the business plan must prove why the key company personnel are “eminently qualified” to execute on the business model.*

### **Management Team Members**

- *Who are the key members of your management team?*

### **Management Team Gaps**

- *Who do you still need to hire?*

### **Board Members**

- *Do you have a Board? If so, who is it comprised of?*

## **IX. Financial Plan**

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### ***Revenue Model***

- *In what ways do you generate revenues?*

### ***Financial Highlights***

#### **Key Assumptions**

- *What key assumptions govern your financial projections?*

#### **Topline Projections**

- *What are your topline 5 year financial projections?*

### ***Funding Requirements/Use of Funds***

- *How much money do you need to start and/or run your business? What are the primary uses of these funds?*

### ***Exit Strategy (or Repayment Strategy)***

- *How will equity investors be paid? How will debt investors be paid?*

## **X. Appendix**

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*The Appendix is used to support the rest of the business plan.*

*Include the following (if applicable) in the Appendix:*

- *Projected Income Statements, Balance Sheets and Cash Flow Statements*
- *Technology: Technical drawings, patent information, etc.*
- *Product/Service Details*
- *Partnership and/or Customer Letters*
- *Expanded Competitor Reviews*
- *Customer Lists*

**Attention Entrepreneurs:** Now, if you want to finish your business plan FAST and you don't want to struggle with your financial model, then you're in luck...

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