Business Plan Template
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EXECUTIVE SUMMARY

Briefly Describe Your Business: (One paragraph summary)

Legal Organization: (LLC, Sole Proprietor, S Corporation)

Ownership: Enter name(s) of owner(s)

Funding Request:

BUSINESS DESCRIPTION

Business Description: (Provide a detailed description of your products, services, organization, operations and management)

Vision: What are your long-term aspirations?

Mission: Why do you exist?
GOALS

*Ensure that goals are S.M.A.R.T. – Specific, Measurable, Achievable, Realistic, and Timed*

Short-Term Goals (less than one year):

Long-Term Goals (one year or more):

SWOT ANALYSIS

WITHIN THE COMPANY

Strengths:

Weaknesses:

OUTSIDE THE COMPANY

Opportunities:

Threats:
INDUSTRY CHARACTERISTICS & TRENDS

CUSTOMER

Demographics: Who are your customers? (average age, income, education, etc.)

Psychographics: What are your customers’ personalities, values, attitudes, interests, and lifestyles?

Geographic Area: What area do you serve?
**COMPETITORS**

*Provide top 3 competitors with strengths and weaknesses for each competitor, feel free to add more.*

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SALES PROJECTION SUPPORTING DATA

Potential Customer Base:

National Trends:

Competitive Advantage:

Share of existing market to capture:
MARKETING PLAN

Social Media:

Customer Loyalty Program:

Website:

Internet Advertising:

Blog:

Newsletter:

Direct Mail:

Radio:

Newspaper:

Television:
SUPPORT PROFESSIONALS

CPA:

Attorney:

Bank:

Insurance:

SBDC Consultant:

Other:

FINANCIAL PROJECTIONS SUMMARY AND ASSUMPTIONS

*See spread sheets