*Company Logo*

*[Company Name]*

*[Company Address]*

*[Company Phone Number]*

*Prepared By:*

*[Your Name]*

*[Your Role]*

*[Your Email]*

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Executive Summary

*[Provide a one-two page overview of the business and highlight the most crucial pieces of information for readers. Typically, this brief executive summary includes:*

* *A Mission Statement*
* *The Company History and Leadership Model*
* *An Overview of Competitive Advantage(s)*
* *Financial Projections*
* *Company Goals*
* *An Ask From Potential Investors]*

Company & Business Description

Company Purpose

*[Provide a 1-2 paragraph description of your business, specifically highlighting what types of products/services you will provide, who your target market is, and why you think you’ll succeed with your current business plan.]*

Mission/Vision Statement

*[Insert your company’s mission and/or vision statement.]*

Core Values

*[Outline your company’s core values and why they were chosen.]*

Team & Org Structure

*[Provide an overview of your company. Who are the employees in key leadership roles, and what experience will they bring? How will your organization be structured?]*

Products and Services Line

Product Offering(s)

*[Describe your product line in more detail, if applicable. List each product and its functionality.]*

Service Offerings

*[Describe your service line in more detail, if applicable. List each service and why you’re offering it.]*

Pricing Model

*[What will you charge for each of your products and services? What will your markups be and why?*

Market Analysis

Target Market

*[Outline the market you’re targeting and why you’re doing so. Highlight the demographics, psychographics, and size of your total addressable market.]*

Buyer Personas

*[Who are you targeting? Buyer personas are semi-fictional representation of your ideal customer based on market research and real data about your existing customers. Outline these ideal customer personas here*

Location Analysis

*[Explain why you’ve chosen your (proposed) location and what benefits you expect to see from it.]*

Competitor Analysis

*[Explain the state of competition in your industry. You might want to include a SWOT analysis or a Porter’s Five Forces analysis here or in your appendix.*

*To summarize this info, list your top competitors as well as the following information for each competitor:]*

* **Comparative Strength** – *What are your company’s assets that this competitor does not have?*
* **Comparative Weakness –** *In what areas or attributes do your competitors outperform you?*
* **Counterpoints –** *If a comparative weakness is mentioned in sales negotiations, which counterpoints can be used to address those weaknesses*

|  |  |  |  |
| --- | --- | --- | --- |
| **Competitor Name** | Comparative Strength(s) | Comparative Weakness(es) | Counterpoint(s) |
| **Competitor A** |  |  |  |
| **Competitor B** |  |  |  |
| **Competitor C** |  |  |  |

Marketing Plan

Positioning Strategy

*[Why are potential buyers going to be interested in your product? How will you address your buyer persona’s biggest challenges and goals? How will you use a website to your advantage?]*

Acquisition Channels

*[What are your main customer acquisition channels (e.g., search engine marketing, event marketing, blogging, co-marketing, paid, etc.) and what do you plan to prioritize this year?]*

Tools and Technology

*[What systems will you equip your marketing team with? Will you use a CMS, marketing automation software, or blogging software? If so, list it here.]*

Sales Plan

Sales Methodology

*[How will you reach and engage with new leads? Are you pursuing an inbound or outbound sales strategy? Why does your prospecting strategy make sense for your business?]*

Sales Organization Structure

*[Who will be in charge of selling your products and/or services? How will sales and marketing work together? How will the breakdown of roles look?]*

Sales Channels

*[What will you utilize to sell your products? Will you sell online, in stores, or through sales reps? Are you going to sell at your own store or distribute to other stores?]*

Tools and Technology

*[Describe the sales tools you will utilize – such as live chat, website and ecommerce sales integrations, your CRM software, and call software – and how they will help you hit your goal.]*

Legal Notes

Legal Structure

*[What type of legal structure will your business be?]*

Legal Considerations

*[What legal considerations does your business need to keep in mind for its core operating procedures? List all government registrations, permits, health codes, insurance requirements, and zoning laws you need to address and how you have addressed/will address them.]*

Financial Considerations

Startup Costs

*[Outline each of your startup costs as a line item, followed by a total cost. You may also want to provide a more detailed list of costs – including vendors and payment dates – in the appendix].*

Sales Forecasts

*[Provide your sales forecasts for the next several quarters or years. You may want to summarize the forecasts and point to a bottom-line metric, then point to a more detailed spreadsheet in your appendix.]*

Break-Even Analysis

*[Share at which point in time and after how many dollars/units in sales are reached before you break even. You may want to attach a more in-depth break-even analysis in the appendix if this section gets too convoluted.]*

Projected P&L

*[Explain your profit and loss projections for at least one year. If you’re expected to turn a profit shortly after one year, include that date in this section. If not, point readers to the full projected P&L in the appendix.]*

Funding Requirements

*[What funding will you need in the immediate future to make your business a success?]*

Appendix

*[The following sections are each optional – feel free to include, exclude, or add any charts or information you think is appropriate.*

* *Floor plans*
* *Patents*
* *Org chart*
* *Financial charts]*

**Did We Miss Something?**

*Add another section here if you need it.*

#