# YOUR BUSINESS NAME

Business Plan

YOUR NAME, Owner

**Created on DATE**

Table of Contents

[Executive Summary 3](#_Toc101269880)

[Company Description 4](#_Toc101269884)

[Market Analysis 5](#_Toc101269888)

[Organization and Management 6](#_Toc101269893)

[Service or Product Line 7](#_Toc101269896)

[Marketing and Sales 9](#_Toc101269902)

[Funding Request 10](#_Toc101269906)

Appendix 11

## Executive Summary

### Product

Explain your product or service. Describe in a few words what makes it unique or valuable to the market and who it serves.

### Customers

Explain your target audience and the way your product or service meets a need for them. Provide enough detail to illustrate who would be your ideal customer, whether through job titles, social roles, or other demographic identifiers. Make sure to clearly identify the appeal of your service or product to your target customer in a few sentences.

### Future of the Company

Briefly describe how your product or service will continue to scale to meet the needs of your customer. Include high-level financial information. Financial projections will cover this in more detail, but you’ll need to include this general understanding of your growth potential when asking for financing.

## Company Description

### Mission Statement

Write out the official mission statement of your business.

### Business Overview

Explain what your business offers, and how it came to be. How does your business model work? What problem did the industry face that prompted you to start your business? What success have you experienced so far? What are your future goals for scaling the business?

**Lender Tip |** Share your business’ history in this section. SBA lenders want to get an idea of your trajectory up to this point. Knowing your business history helps them prepare your ideal financing options.

### Legal Structure

State what type of business you are, and where you are incorporated or based.

## Market Analysis

### Industry

Describe your industry in detail in this paragraph. Explain industry standards for businesses like yours, how similar businesses typically operate in the field, and how your business will fit into this landscape. Include any relevant data about recent market changes or challenges, and statistics on future growth expectations.

### Detailed Description of Customers

Describe your target customer and why you plan to pursue the audience you’ve chosen. This is the place to include a more in-depth profile of who would find your product or service most appealing. For example, if you’re offering a professional service, list the job titles, company types, and industries that would utilize your business. If you’re offering a product, explain who is most likely to buy it and on what occasion. What need does your business meet?

### Competitive Position

List your company’s advantages that help you stand out from the competition. These might include facilities, team members with specialized knowledge or training, available resources, industry expertise, new technologies, etc.

* List an advantage here
* List an advantage here
* List an advantage here

Are there any weaknesses in the market or in your company that could threaten your success? List them here to accurately depict the state of your business.

**Lender Tip |** You may want to format this section as a SWOT (Strengths Weakness Opportunities Threats) Analysis. You can format this as a standard table with four sections, one for each prong of the analysis.

### Regulations

Are there any regulations specific to your industry that you need to meet? List out the federal and state codes and title numbers specific to your operations.

## Organization and Management

### Organization

Share your organization chart for your business.

### Principal Members

Detail your leadership team’s roles. Share each person’s primary responsibilities, and reference any CVs or resumes for the team members who bring their relevant industry experience or education to the company. Attach their full resumes in the Appendix of the Business Plan.

YOUR NAME HERE – Title | Short biographical paragraph.

NAME HERE – Title | Short biographical paragraph.

NAME HERE – Title | Short biographical paragraph.

NAME HERE – Title | Short biographical paragraph.

**Lender Tip |** For SBA loan applications, make sure your information in this section highlights any prior management experience, qualifications, and/or certifications held by you or your team members.

## Product/Service Line

### Product/Service

List out your services or products by name.

* Service: Brief Description
* Service: Brief Description
* Service: Brief Description
* Service: Brief Description
* Service: Brief Description
* Service: Brief Description

### Pricing Structure

List pricing for your services or products depending on how you charge, whether by unit price, hourly fees, or on a project basis.

* Service: $00.00
* Service: $00.00
* Service: $00.00
* Service: $00.00
* Service: $00.00
* Service: $00.00

### Product Lifecycle

How long does it take to deliver your service? Are there any production or development timelines that need to be considered? When would your customer need to make another purchase?

### Intellectual Property Rights

Share any patents or copyrights your business has filed in this section.

### Research and Development

If you plan to conduct Research and Development, list upcoming projects you plan to pursue:

* Description of project
* Description of project
* Description of project

## Marketing and Sales

### Growth Strategy

Explain how you plan to grow your company’s share of the market. Include any mediums that you will use for marketing (for example, digital, print, and/or events), primary activities to generate brand awareness, and any other unique strategies.

* List a method in your growth strategy
* List a method in your growth strategy
* List a method in your growth strategy

### Communicate with the Customer

List the methods for how you will deliver messaging to your customers. This could include in-person events, email marketing, social media platforms, meetings with referral partners, etc.

* List a communication method
* List a communication method
* List a communication method

### How to Sell

How do customers currently purchase a product or make a deal for a service? Explain which channels you currently use to make sales, and how those might scale as you grow.

## Funding Request

### Amount

How much money do you need from financing? List out a dollar amount.

### Use of Proceeds

What projects do you need the financing for?

* List use of proceeds
* List use of proceeds
* List use of proceeds

**Lender Tip |** Explain how your business would benefit from an SBA loan in this section. You may want to highlight a few of the challenges your business faces in the current landscape, and how this funding would help you develop a solution to address them.

### Financial Projections

Include a table depicting your financial projections for the next few years. Base these calculations on cash flow statements from your most recent years, income statements, balance sheets, and recurring expenses.

## Appendix

Attach any supplementary documents in this section, including resumes or CVs if requested.