

Business Plan Template



Executive Summary (save for last)

This is your compelling elevator pitch. Summarize the main sections of your business into a paragraph or two. The ideal executive summary provides the reader with a high-level understanding of how the business operates and makes money.

Business Description

Describe your business in more detail. What's the origin story behind your business, the values that you want or want to continue to instill? Include what problem your company is solving and what makes you different.

Team

Who's on your team? What will each team member's roles be? Why are they the best fit for your business?

Operations

What needs to happen so your business can operate day to day? Are there any capital or expense requirements you will need? Does your business need a location, equipment, inventory, or a supply chain to operate? Is everything feasible? Have you tested out your idea and what was the result?

Marketing & Sales

Is there a demand for a product or service similar to what your business provides? Is the market saturated with similar products/services? How is your product or service positioned? How will you attract and retain customers (or clients)? What is your marketing funnel and value ladder? What does the sales process look like? Will you run ads or grow organically? What social media platforms will you utilize?

Funding

How will you fund your business, with equity or debt? Where is this money coming from (i.e. self, family, friends, credit cards, loans, outside investors, etc.)? How will you utilize your funds? What type of ROI can investors expect? Will they have an exit plan?

Financial Projection

Describe the finances behind the operation. Start with a balance sheet and income statement for 5 years (broken down monthly, quarterly, or annually). Use charts and graphs to tell the story of how you think the business will perform.

Financial Plan

Describe the finances behind the operation. What are the start-up costs? How much are you planning on spending to start and in the first year? What are your revenue projections over 1, 3, or 5 years?