

# Simple Business Plan Outline

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## 1. Executive Summary

Write this last. It's just a page or two that highlights the points you've made elsewhere in your business plan. It's also the doorway to your plan—after looking over your executive summary, your target reader is either going to throw your business plan away or keep reading, so you'd better get it just right.

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## 2. Company Summary

This section is an overview of who you are and what you do. It should summarize your vision and what you hope to deliver to your market, but it should also ground the reader with the nuts and bolts: when your company was founded, who is/are the owner(s), what state your company is registered in and where you do business, when/if your company was incorporated, and a bit about your recent sales and growth trajectory.

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## 3. Products and Services

List and describe the products or services you sell. It is always a good idea to think in terms of customer needs and customer benefits as you define your product offerings, rather than thinking of your side of the equation (how much the product or service costs, and how you deliver it to the customer). Sometimes this part of the plan will include tables that provide more details, such as a bill of materials or detailed price lists, but more often than not this section is just text.

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## 4. Market Analysis Summary

You need to explain the type of business you're in. You need to know your market and how it's changing, your customers' needs, where your customers are, how to reach them and how to deliver your product to them. You'll also need to know who your competitors are and how you stack up against them—why are you sure there's room for you in this market?

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## 5. Strategy and Implementation Summary

In the first part of this section, you need to define your strategic position: What do you do for your target market, and what makes you the best? In the second part of this section, you need to outline how you're going to develop and maintain a loyal customer base. Be specific. Include management responsibilities with dates and budgets, and make sure you can track results.

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## 6. Management Summary

Describe the organization of your business, and the key members of the management team. Include summaries of your managers' backgrounds and experience—these should act like brief resumes—and describe their functions with the company. Full-length resumes should be appended to the plan.

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## 7. Financial Plan

At the very least this section should include your projected Profit and Loss and Cash Flow tables, and a brief description of the assumptions you're making with your projections. You may also want to include your balance sheet, your sales forecast, business ratios, and a break-even analysis.

# Detailed Business Plan Outline

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## 1.0 Executive Summary

- 1.1 Objectives
  - 1.2 Mission
  - 1.3 Keys to Success
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## 2.0 Company Summary

- 2.1 Company Ownership
  - 2.2 Company History (for ongoing companies) or Start-up Plan (for new companies)
  - 2.3 Company Locations and Facilities
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## 3.0 Products and Services

- 3.1 Product and Service Description
  - 3.2 Competitive Comparison
  - 3.3 Sales Literature
  - 3.4 Sourcing and Fulfillment
  - 3.5 Technology
  - 3.6 Future Products and Services
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## 4.0 Market Analysis Summary

- 4.1 Market Segmentation
- 4.2 Target Market Segment Strategy
  - 4.2.1 Market Needs

- 4.2.2 Market Trends
  - 4.2.3 Market Growth
  - 4.3 Industry Analysis
    - 4.3.1 Industry Participants
    - 4.3.2 Distribution Patterns
    - 4.3.3 Competition and Buying Patterns
    - 4.3.4 Main Competitors
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## **5.0 Strategy and Implementation Summary**

- 5.1 Strategy Pyramids
  - 5.2 Value Proposition
  - 5.3 Competitive Edge
  - 5.4 Marketing Strategy
    - 5.4.1 Positioning Statements
    - 5.4.2 Pricing Strategy
    - 5.4.3 Promotion Strategy
    - 5.4.4 Distribution Patterns
    - 5.4.5 Marketing Programs
  - 5.5 Sales Strategy
    - 5.5.1 Sales Forecast
    - 5.5.2 Sales Programs
  - 5.6 Strategic Alliances
  - 5.7 Milestones
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## **6.0 Management Summary**

- 6.1 Organizational Structure
- 6.2 Management Team

**6.3** Management Team Gaps

**6.4** Personnel Plan

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## **7.0 Financial Plan**

**7.1** Important Assumptions

**7.2** Key Financial Indicators

**7.3** Break-even Analysis

**7.4** Projected Profit and Loss

**7.5** Projected Cash Flow

**7.6** Projected Balance Sheet

**7.7** Business Ratios

**7.8** Long-term Plan

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## **8.0 Appendix**