

Executive Summary

This section should:

- Be written last.
- Provide an enthusiastic snapshot of your company, explaining who you are, what you do and why.
- Be less than 2 pages in length.

After reviewing this section the reader should:

- Want to learn more about your business.
- Have a basic understanding about your company.

Business Description and Vision

This section should include:

- Mission statement (business purpose).
- Company vision (statement about company growth).
- Business goals and objectives.
- Brief history of the business.
- List of key company principals.

After reviewing this section the reader should know:

- What the business is, and what it stands for.
- Your perception of the company's growth & potential.
- Specific goals and objectives of the business.
- Background information about the company.

Definition of the Market

This section should:

- Describe your business industry and outlook.
- Review the market research done, and what the conclusions are.
- Define the critical needs of your perceived or existing market.
- Identify your target market.
- Provide a general profile of your targeted clients.
- Describe what share of the market you currently have and/or anticipate.

After reviewing this section the reader should know:

- Basic information about the industry you operate in and the customer needs you are fulfilling.
- You have carried out market research, and understand the findings.
- Market research justifies the business you have chosen.
- The scope and share of your business market, as well as who your target customers are.

Description of Products and Services

This section should:

- Specifically describe all of your products and services.
- Explain how your products and services are competitive.
- If applicable, reference a picture or brochure of your products, which would be included in the plan's appendix.

After reviewing this section the reader should know:

- Why you are in business.
- What your products and services are and how much they sell for.
- How and why your products & services are competitive.

Organization and Management

This section should:

- Provide a description of how your company is organized as well as an organization chart, if available.
- Describe the legal structure of your business (proprietorship, partnership, corporation, etc.).
- Identify necessary or special licenses and/or permits your business operates with.
- Provide a brief bio description of key managers within the company.

After reviewing this section the reader should know:

- The legal form of ownership for your business.
- Who the leaders are in your business as well as their roles.
- The general flow of operations within the firm.

Marketing and Sales Strategy

This section should:

- Identify and describe your market – who your customers are and what the demand is for your products & services.
- Describe your channels of distribution.
- How you plan to reach your clients / customers.
- Why your products / services will be able to compete well, and meet the need of the market.
- Explain your sales strategy, specific to pricing, promotion, products and place (4Ps).

After reviewing this section the reader should know:

- Who your market is and how you will reach it.
- How your company will apply pricing, promotion, product diversification and channel distribution to sell your products and services competitively.

Financial Management

This section should include:

- For a New Business
 - Estimate of start-up costs.
 - Projected balance sheet (1 year forward).
 - Projected income statement (1 year forward).
 - Projected cash flow statement (12 months forward).
- For an Existing Business
 - Balance sheets (last 3 years).
 - Income statements (last 3 years).
 - Cash flow statement (12 months).
- If Applying for a Loan (in addition to the above)
 - Current personal financial statement on each principal.
 - Federal tax return for prior year.

After reviewing this section the reader should:

- Have a good understanding regarding the financial capacity and/or projections for your company.

Operational Plan

This section should:

- Facilities and location.
- Business license, registration.
- Staffing requirements.

- How you propose to operate your business.

After reviewing this section the reader should know:

- The operational aspect of your business is well thought out.

Conclusions

This section should include:

- Timelines to get started
- Window of opportunity?
- Identified risks, and how they will be dealt with.
- Restate your ability to run this business.
- Your contributions (skills, funds) to get this business going.

After reviewing this section the reader should know:

- You will have the ability to run this business.
- You will have the ability to succeed in this business.
- Your idea is well thought out.
- Risks are identified and can be dealt with.

Appendices

This section should include:

- Resume on yourself.
- Evidence of cash / equity to put into the business.
- Letters of support.
- Estimates for any outside contractors you may be using, builders, etc.
- If you have done up any brochures, add these in.