

BUSINESS PLAN

TABLE OF CONTENTS

Your business plan is divided into the following sections:

1	BUSINESS OVERVIEW	
	Description of the Business	2
	Major demographic, economic, social and cultural Factors	2
	Major Players	2
	Trends in the Industry	2
	Government Regulations	2
	THE MARKET	
	Market Segment	3
	Products & Services	3
	Pricing and Distribution	3
	Market trends	3
	Implications or risk factors	3
	THE COMPETITION	
	Competitors and type of competition	3
	Competitors' Strengths and Weaknesses	3
	Competitive advantage	4
2	SALES & MARKETING PLAN	
	Customers	5
	Suppliers	5
	Advertising & promotion	5
	Pricing & distribution	5
	Customer service policy	6
3	OPERATING PLAN	
	Business location & requirements / advantages / lease details	7
	Equipment / technology / R&D / environmental aspects	7
4	HUMAN RESOURCES PLAN	
	Key employees	9
	Policies & procedures	9
5	ACTION PLAN	
	Action plan & timetable	10
6	EXECUTIVE SUMMARY	
	A brief description of the project, the financing required, and additional information that help explain the business plan	11
7	APPENDIX: FINANCIAL PLAN	
	The company's financial performance both historical and projected (available in the kit Excel spreadsheet). Includes sales cost of goods sold expenses income statement balance sheet cash flow budget financial requirements performance indicators and personal status.	14
	HOW TO PRINT THESE INSTRUCTIONS	
	FINANCIAL PLAN (EXCEL SPREADSHEET)	

BUSINESS PLAN

Section 1

Business Overview

Legal name: _____

Trading name: _____

Business address: _____

Phone: _____ Fax: ▶ _____

E-mail: _____

Description of the Business

Major demographic, economic, social and cultural Factors

Major Players

suppliers, distributors, clients

Nature of the Industry

Trends in the Industry

BUSINESS PLAN

Section 1

Business Overview

Government Regulation

THE MARKET

Market Segment

Products & Services

Pricing and Distribution

Market Trends

Implications or Risk Factors

Planned Response

THE COMPETITION

Competitors and type of Competition

Competitors' Strengths and Weaknesses

Competitive Advantage

BUSINESS PLAN

Section 2

Sales and Marketing Plan

Customers

NAME \ ADDRESS	TERMS	PRODUCT / SERVICE
1		
2		
3		
4		

ADDITIONAL INFORMATION

Suppliers

NAME \ ADDRESS	TERMS	PRODUCT / SERVICE
1		
2		
3		
4		
5		

ADDITIONAL INFORMATION

Advertising & Promotion

Pricing & Distribution

Customer Service Policy

BUSINESS PLAN

Section 3

Operating Plan

Location

Size and Capacity

Advantages or Disadvantages

Lease or Ownership Details

Equipment, Furniture & Fixtures

Future Expenditures / Technology Requirements

Research and Development

Environmental Compliance

Additional Information

BUSINESS PLAN

Section 4

Human Resources Plan

Key Employees

NAME OR TITLE (N° OF POSITIONS)	KEY RESPONSIBILITIES	QUALIFICATIONS
1		
2		
3		
4		
ADDITIONAL INFORMATION		

POLICIES AND PROCEDURES

Hours of Operations

Number of Employees

Vacation Program

Performance Assessment

BUSINESS PLAN

Section 4

Human Resources Plan

Training & Development

Remuneration and Benefits

BUSINESS PLAN

Section 5

Action Plan

Action Plan

ACTION	BY WHEN
1	
2	
3	
4	
5	
6	
7	

ADDITIONAL INFORMATION

BUSINESS PLAN

Section 6

Executive Summary

Objectives / Description of the Project

Business History / Nature of Operations

Products and Services

Project Financing

Management / Advisors

Director 1

Director 2

Risk Assessment & Contingency Plan

Financial Institution

BUSINESS PLAN

Section 6

Executive Summary

Supporting Documents
