

COMPREHENSIVE BUSINESS PLAN OUTLINE

Title Page

- Your Company's Name, Address, Phone, Fax, email, and web site address.
- Owners or owners-to-be
- Prepared by ...
- List contact information for someone to answer questions about the plan.
- Personalize where submitted to a prospective stakeholder.

I. Non-Disclosure Agreement (where appropriate)

II. Table of Contents

III. Executive Summary

- This is a one to three page highlight of the business concept
- Demonstrate management expertise, and market potential
- Provide sales and profit forecast and financing needed

IV. Operations Plan

- A. Business Concept
 - Type and size of business
 - History (if any)
 - The product/service and what makes it unique
 - General description of customers
 - Patents/Copyrights (if any)
- B. Production/Service Plan (typical cycle in your business operations)
- C. The Facility
- D. Suppliers

V. The Market

- Market size-past and projected
- Market trends-future
- Products in the market
- Market players
- Market segments and growth potential
- Market distribution methods
- Competitive analysis

VI. Market Strategy/Implementation

- Target market by segment; identify your niche
- Pricing strategy, such as lowest priced, value priced, or premium priced.
There are three Briefs on pricing; see [7.00 \(Retail\)](#), [7.01 \(Services\)](#), [7.02 \(Manufacture\)](#)
- Desired company image

- Advertising and public relations
- Methods of selling and servicing, distribution channels to be used
- Warranty policies

VII. Products/Services

- Describe the product/service
- What is its competitive advantage/disadvantage?
- Identify the costs involved; set necessary margin amount
- Explore future Products/Services

VIII. Research & Development (where applicable)

IX. Operations

- Facilities requirements
- Labor requirements
- Production options
- Capital needs, equipment list
- Controls and other considerations

X. Management

- The Management Team
- Legal structure of the business
- Personnel hired, and expected to be hired
- Business advisors

XI. Goals and Milestones

- A statement of business objectives
- A listing of measurable near-term and long-term goals
- Milestone dates.

XII. Financial

- A. Current Conditions
 - Personal financial statement
 - Past tax reports
 - Historical financial statements of the business, where applicable (balance sheets, profit and loss and cash flow statements).
- B. Forecasts (three to five years)
 - Profit and loss statements
 - Balance sheets
 - Cash flow forecasts
 - Changes in Shareholders' Equity
- C.
 - Request for financing, sources and uses of funds

(See Disclaimer on following page ...)

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