

## Names

Business Name

Legal Address (important papers):

Business Address:

Phone:

Email:

## **Executive Summary**

### **WRITE THIS LAST**

#### **VISION AND MISSION**

Vision: where will the company be in 5 years

Mission: what do you do WELL everyday

#### **COMPANY OVERVIEW**

A short snapshot of who your customers are, what problem you are trying to solve, what products you will offer and the value you will provide to your customers.

#### **ORGANIZATION AND MANAGEMENT**

##### **Owner Profile**

Toot your own horn! This section explains who you are, your background, and why your experience will lead to a successful business. Why are you right person to run this business?

##### **Operating team**

Who will run the day to day operations? Who are the employees? What are their roles? Why are they the right person for the role? Who are the partners? (legal, accounting, vendors etc)

##### **Legal Structure**

Are you a Sole Proprietor? LLC? S Corp? C Corp? If there are partners, what is a brief summary of the operating agreement (initial investment, profit sharing, buy out).

#### **PRODUCT/SERVICE STRATEGY**

This section reviews your current products and what makes them unique and competitive. (your Value Propositions)

We also need to include your service / product menu and pricing strategy here.

Include patents, property, and legal rights here.

## **MARKET ANALYSIS**

This section will help you define your market, the demographics and psychographics (customer demand which includes lifestyles, motives and interests) of your target customers; your competitor's products and the business risks.

We also need to address economic factors, such as, the more disposable income your customers have, the more likely they will buy your product. I will research your industry and add an industry report to this section.

### **Marketing Plan**

Which channels do you plan to use to reach your market(s)? Digital media? Cold calls? Partnerships?

## **FINANCIAL PLAN**

This section will cover how much you will need to have your shop complete (all equipment and materials) and also what you will need monthly to keep going. We also need to address your profit potential.

### **APPENDIX:**

This often includes:

Cash flow projection (SBDC will help)  
List of Start up and ongoing expenses

If you are looking for funding include:

Personal financial statement  
3 years tax returns