

# **Business Plan Template**

## **The Executive Summary**

This should be completed LAST even though it is first in your business plan.

This summarizes everything you have said in the other 9 worksheets. Like an elevator-pitch, if you were to try to explain your business in a minute or less, what would you say? It should be short, unique, interesting, and persuasive.

# Business (Company) Overview Worksheet

Write a detailed description of your business including the following elements:

## The Legal Structure

- ☐ Sole proprietor
- ☐ Partnership
- ☐ Corporation
- ☐ Limited Liability Corporation (LLC)

*Why have you selected this form of business?*

## Business Formation History

**Mission Statement** (Explain your reason for being and your guiding principles.)

**Company Goals and Objectives** (Describe what you intend the business to achieve regarding the industry, customers, and even the world.)

**Business Philosophy** (*What is important to the business and why?*)

**Customer Description** (*To whom will you market your products/services?*).

**Industry Description** (*Describe the expected growth and how your business can help.*)

**Business Strengths** (*What factors will make the company succeed? What background experience, skills, and strengths give you an advantage over others?*)

**Location**

State/Province:

Country:

Language:

**Doing Business Via**

*Check or insert other options that apply to your business.*

- |   |  |                          |
|---|--|--------------------------|
| <input type="checkbox"/> Website            | <input type="checkbox"/> Consignment       | <input type="checkbox"/> |
| <input type="checkbox"/> Storefront         | Shops                                      | <input type="checkbox"/> |
| <input type="checkbox"/> Online Shop        | <input type="checkbox"/> Local             | <input type="checkbox"/> |
| <input type="checkbox"/> Email              | Pickup/Delivery                            | <input type="checkbox"/> |
| <input type="checkbox"/> Events             | <input type="checkbox"/> News Subscription | <input type="checkbox"/> |
| <input type="checkbox"/> Home Shows         | <input type="checkbox"/> FB Marketplace    | <input type="checkbox"/> |
| <input type="checkbox"/> Online Advertising | <input type="checkbox"/> Amazon            | <input type="checkbox"/> |
|   | <input type="checkbox"/> Sellwire          |                          |
|   | <input type="checkbox"/> Selffy            |                          |

**Notes & Additional Info**



## Operations Plan Worksheet

Explain and describe how each business area will function. Include info about the physical setup and the responsibilities for specific tasks that team members will perform. These tasks/procedures are called Standard Operating Procedures (SOP).

Business Area:

Task:

Subject/Issue:

Team/Members:

SOP:

Business Area:

Task:

Subject/Issue:

Team/Members:

SOP:

Notes:

Business Area:

Task:

Subject/Issue:

Team/Members:

SOP:

Business Area:

Task:

Subject/Issue:

Team/Members:

SOP:

## **Operation Area Plan Notes**

Area:    Date:



## **Market Analysis Worksheet**

Give an overview of your market including things they frequently have in common as well as unique qualities that make some market sub-sections quite different. Be sure to include a variety of their problems, concerns, fears, etc.

### **Market Overview:**

## Ideal Customer Target Market Info

Envision your ideal customers and your target market. Use the demographics below to help you define your target in more depth and focus on the people you can help best.

<b>Location</b>	State/Province:	Country:
<b>Language – Speaks/Writes</b>	English French	Spanish Other: _____ —
<b>Gender</b>	Male	Female
<b>Age</b>	Under 25 25-35 35-45	45-55 55-65 _____ —
<b>Marital/Family Status</b>	Single Single with child(ren)	Married * with child(ren) Grandparent (has grandchildren) _____ —

<b>Education</b>	Less than a high school graduate to Post High school graduate	Some college/ 2-year degree diploma Graduate (Masters, etc.) _____
<b>Interests</b>	_____ _____ _____ _____ _____	_____ _____ _____ _____ _____
<b>Buying Motivations</b>	Comfort/Convenience Money/Security Health/Wellness Other: _____ _____ Other: _____ _____	Prestige/Pride Emotional/Pleasure Other: _____ _____ Other: _____ _____ Other: _____ _____

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Describe and explain how you intend to meet the wants and needs of your market

## Products and Services Worksheet

Describe the products you create, sell, and/or the services you offer. Use the following list to help you discover new ideas, identify, and classify your products or services. Then provide a brief description of each existing product.

### Writing/Ebooks

- ☐ Ebook – non-fiction
- ☐ Ebook – fiction
- ☐ Poetry book
- ☐ Ecommerce product descriptions
- ☐ Copywriting templates
- ☐ Recipe books
- ☐ Document templates
- ☐ Reports/analytics templates
- ☐ Email campaign templates
- ☐ Academic research, papers, findings
- ☐ Magazines
- ☐ Writing cover letters
- ☐
- ☐
- ☐
- ☐
- ☐

### Audio

- ☐ Songs

## Beats

🔍 Jingles 🔍

## Ringtones

🔍 Sound effects

🔍 Voice overs (as a service)

🔍 Instrumental tracks

🔍

🔍

🔍

🔍

🔍

## Video

🔍 Sell short films (entertainment)

🔍 Video animation intros

🔍 Stock video

🔍 Video tutorials (ex. How tos)

🔍 Professionally edited event videos as a service

🔍 Documentary

🔍 Stand-up comedy

🔍

🔍

# Design

- 🔍 Wallpapers
- 🔍 Posters/prints
- 🔍 Emojis/bitmojis
- 🔍 Fonts
- 🔍 Photoshop/illustrator templates
- 🔍 Branding services
- 🔍 Photoshop services (airbrushing, touch ups, etc.)
- 🔍 Logo design
- 🔍 Business card design
- 🔍 Infographic design
- 🔍 Turn images into vector files
- 🔍 PowerPoints / Keynote presentation templates
- 🔍 Printable coloring book pages
- 🔍 3D models
- 🔍 VR/AR templates
- 🔍 Icon sets
- 🔍 Wedding invitation templates
- 🔍 Comics
- 🔍 Printable calendars
- 🔍 Printable journals
- 🔍
- 🔍
- 🔍

# Photography

🔗 [Lightroom/photoshop presets](#)

🔗 [Mockup images](#)

🔗 [Stock photos](#)

🔗 [LUTs \(Lookup Tables\)](#)

🔗

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# IT/Tech

🔗 [Apps](#) 🔗

Games

🔗 [Browser plugins](#)



Website themes

Setup for online stores, blogs, websites

Selling domains

🔗 Provide hosting services

🔗 Zapier templates

🔗 Code snippets

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## Teaching & Skill Sharing

🔗 Language lessons

☐ Financial consultations

☐ Financial planning

☐ Coaching/mentoring sessions

☐ Tutoring

☐ Resume touchup service

Essay-writing service

Translations

Social media marketing

☐ User testing

☐ Proofreading service

☐ Editing

☐ Audits (accounting audits, content audits, etc.)

☐ Career consultations

☐ Virtual assisting

☐

☐

☐

☐

☐

# How-Tos & Digital Courses

- ☐ Courses – of any and all kinds
- ☐ Sewing patterns
- ☐ Knitting patterns
- ☐ Nutrition plans
- ☐ Meal-prep plans
- ☐ Workout plans
- ☐ Worksheets (educational curriculum ideas)
- ☐ Paid newsletters
- ☐ Woodworking instructions – step-by-step tutorials
- ☐ Board game printouts
- ☐ Meditation/subliminal programs
- ☐ Painting tutorials
- ☐
- ☐
- ☐
- ☐

## Your Products and Services

Product/Service Name:

Category:

Format/Type (eBook, audio, etc.):

Description:

Product/Service Name:

Category:

Format/Type (eBook, audio, etc.):

Description:

Product/Service Name:

Category:

Format/Type (eBook, audio, etc.):

Description:

Product/Service Name:

Category:

Format/Type (eBook, audio, etc.):

Description:

Notes:

## **Sales and Marketing Worksheet**

Fill in the following information to help you make sales and market your items/services.

Item:	Cost:
-------	-------

Item:	Cost:
-------	-------

Item:	Cost:
-------	-------

Item:	Cost:
-------	-------

Total Cost:

Product/Service Name:

Description:

What customer needs does this product fill or what issues does it solve?

Price:

Sale Price:

How do these prices compare to your competitors' prices?

What motivation prompts potential buyers to take action and make the purchase?

What methods will you use to market this product/service?

Where will you "advertise" or notify potential customers of this specific offer?

Draft a potential ad for this product/service:

## More Promotion Ideas for This Offer

Ad 2 for this product/service:

Ad 3 for this product/service:

Ad 4 for this product/service:

## Additional Promotion Ideas

# Competitive Analysis Worksheet

On this worksheet, you will identify and research your competitors to assess your direct and indirect competitors' strengths and weaknesses to compare to your own.

Factor	Me	Competitor 1	Competitor 2	Importance Rate
				1 5

Products	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Price	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Quality	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Selection	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Service	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Reliability	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Stability	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Expertise	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Reputation	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Location	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Appearance	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Sale Method	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Credit Policy	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Advertising	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
Images	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
_____	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
_____	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
_____	Strong / Weak	Strong / Weak	Strong / Weak	1	2	3	4	5
_____	Strong / Weak	Strong / Weak	Strong / Weak		2	3	4	



Strong / Weak    Strong / Weak    Strong / Weak

Describe how you can develop a competitive advantage over your competition using the information you discovered when you did your research and analysis.

## **Management Team Worksheet**

Provide pertinent, concise background information on all key players involved in the business.

**Business Area:**

Team

Name:

***Business/Job Info***

Profession:

Specialty:

Website:

Referred by:

Date:

Rating: Name

Rating

Name

Rating

Name

Rating

Name

Rating

Name

Rating

Skills:

Interests:

Other:

***Personal Info***

Mailing Address:

Email:

Phone 1 #:

Phone 2 #:

## Management Team Worksheet

Provide pertinent, concise background information on all key players involved in the business.

**Business Area:**

Team

Name:

***Business/Job Info***

Profession:

Specialty:

Website:

Referred by:

Date:

Rating: Name

Rating

Name

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Name

Rating

Name

Rating

Name

Rating

Skills:

Interests:

Other:

***Personal Info***

Mailing Address:

Email:

Phone 1 #:

Phone 2 #:

# Financial Plan Worksheet

Include all financial information for each section below.

**Amount needed to start the business includes these items:**

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

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Item: \_\_\_\_\_ Cost: \_\_\_\_\_

**Total**

**To maintain the business for the first year includes these items:**

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

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Item: \_\_\_\_\_ Cost: \_\_\_\_\_

**Total**

**The first two years includes these items:**

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

Item: \_\_\_\_\_ Cost: \_\_\_\_\_

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Cost:

**Total**

**three years includes these items:**

[illegible]

**Five years includes these items:**

Item:	Cost:
Item:	Cost:
Item:	Cost:
Item:	Cost:
Item:	Cost:
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Item:	Cost:

**Total Cost:**

## Notes

**Anticipated need for additional funding for these items:**

Item:	Cost:
Item:	Cost:
Item:	Cost:
Item:	Cost:
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Total Cost:

**Ongoing business expenses/subscriptions includes these items:**

Item:	Cost:
Item:	Cost:
Item:	Cost:
Item:	Cost:
Item:	Cost:
Item:	Cost:
Item:	Cost:



Item:	Cost:
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Cost:

Total Cost:

## Notes

Projected Income Statement Worksheet for:

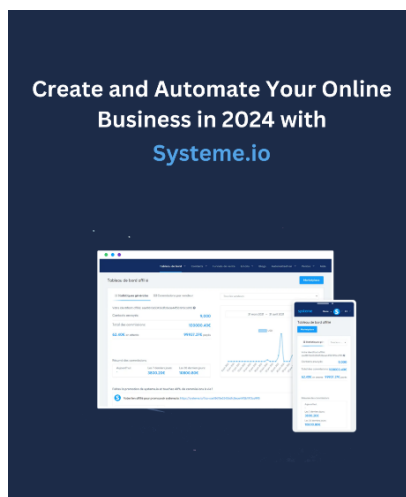
\_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

Months	1	2	3	4	5	6	7	8	9	10	11	12
Total Revenue												
Cost of Goods Sold												
Services Provided												
Gross Profit												
Admin Salaries												
Rent/Mortgage												
Business Equipment												
Outsourcing Bills												
Marketing/Advertising												
Accounting & Legal												
Office Space												
Travel												

Vehicles												
Depreciation												
Repairs & Maintenance												
Licenses												
Taxes-Payroll												
Taxes-Other												
Phone												
Business Subscriptions												
Utilities												
Office Supplies												
Interest												
Postage												
Miscellaneous												
Other:												
Total Expenses												

Pre-Tax Profit (Loss)												

# Two Ways I can Help You



**You can get this amazing promotion for Free !!**

**Attract New Customers By Giving Away Holiday Vouchers**

**To Find Out How to Instantly Boost Your Sales [Click Here](#) !!**

**(No credit card required)**

**Get lifetime access to [systeme.io](#) for FREE!**

***(grab it now before it's gone!)***

**[Click Here](#) !!**

**(No credit card required)**