

# BUSINESS PLAN

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Business Name

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Address

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City, State, Zip

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Telephone / Fax / Email

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Owner's Name & Social Security Number

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Date

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*Notice of Confidentiality*

The information provided by \_\_\_\_\_ in this document is unique to its business and confidential. Anyone reading this is requested not to disclose any of the information without their express written permission.

It is also acknowledged by the reader that the information furnished in this business plan, other than information that is in public domain, may cause serious harm or damage to \_\_\_\_\_ and/or the proposed new owners and will be kept in strict confidence.

**A. Introduction**

**B. Pertinent Business Descriptions**

1. What is the business name?
2. When was the business established and by whom?
3. Where is the business located?
4. Describe the building.
5. Describe the ownership of the facilities. (Will they be purchased or leased?)
6. What is the layout of the facilities?
7. What equipment do you have (Specify if purchased or leased)?
8. What is the legal structure of the business (Sole-proprietorship, partnership, corporation)?
9. Who is your lawyer?
10. Who is your accountant?
11. Who is involved in management and what are their qualifications?
12. Do family members help you?    \_\_\_ Yes    \_\_\_ No  
How many full-time? \_\_\_    How many part-time? \_\_\_
13. Do you have other employees?    \_\_\_ Yes    \_\_\_ No  
How many full-time? \_\_\_    How many part-time? \_\_\_
14. If you have employees, explain the labor situation in your area (i.e. is it difficult to find employees?)

**15. What is the purpose of your business and highlights of progress to date?**

### **C. Products or Services Descriptions**

**16. Describe your products or services: Is there a need for these services or products?**

**17. What is the view of the current status and prospects for the industry?**

**18. How is your business affected by major economic, social, technological or regulatory trends?**

**19. Are government regulations affecting your product or service (list them)?**

**20. How do you distribute your product or service?**

**21. What does it cost to make the product or deliver the service?**

**22. What is your pricing strategy?**

### **D. Competition and Customers**

**23. Who are your major competitors and what is your competitive advantage?**

**24. List brief strengths and weaknesses of your business and your competition. Why will customers choose your product or service? What benefits do you offer? What about your competition?**

**25. Describe your customers.**

**26. Describe customers you would like to attract in the future.**

**27. How large is the market geographically?**

**28. How large is the market? (number of potential customers)?**

**29. How is customer loyalty established in your business?**

**30. What are your service and product warranty policies?**

### **E. Marketing, Promotion, Advertising and Public Relations Plan**

**31. What is your market position?**

**32. What is your promotion plan?**

**33. What is your advertising plan?**

**34. What is your public relations plan?**

**35. Who does your bookkeeping?**

**37. What types of insurance do you carry?**

**38. What are your estimated sales for next year?**

## **F. Personal and Business Goals**

**39. State your long term and short term business goals.**

**40. State your long term and short term personal goals (Use back of page or extra sheet if necessary)**

**41. Provide your brief biography and/or resume and any key employees you have.**