

Elements of the Business Plan/Business Plan Outline

Cover page
Confidentiality page
Executive summary
Financing request—if seeking a loan or investors
Table of contents

General Description of the Venture:

Venture objectives
Opportunity
Context
Industry
Overall strategy
 Target market(s)
 Competition
 Competitive advantage(s)
Management team (background, qualifications, experience, and organization chart)
Ownership structure
Funding structure
Advisors
 CPA
 Attorney
 Banker
Legal form
Alliances
Stages of growth

Marketing Section:

Target market
Analysis of competition
Market offering/competitive advantage
 Product/service strategy
 Price strategy
 Promotion strategy
 Distribution strategy
Proprietary position
Market share

Financial Section:

Financial Projections
Sources and uses of funds
Stages of funding
 Initial funding

cont. →

Expansion funding

Operational Issues:

Timeline, key milestones, and critical path

Hours of service

Key logistics

Facilities

Equipment

Availability of labor

Supplier Relations:

Risks and Responses:

Key risks

Contingency plans

Insurance

Succession plan

Exit/Harvest Strategy:

Conclusion:

Appendix:

Resumes of the management team, board of directors, and any other key personnel

Detailed financial projections

Supporting documentation

- Letters from potential suppliers

- Letters from potential customers

- Letters from potential distributors