
Client Business Plan Template

Company Name _____

Client Name _____

Phone Number _____ Consultant _____

Client Signature _____

Executive Summary

The Executive Summary is the doorway to your business plan. The summary should outline and emphasize your plan's main points.

Objectives

Setting your objectives, such as market share, sales, and profit, will determine your business goals. Make sure your objectives are concrete and measurable. They should indicate a level of sales or profits, a percentage of gross margin, a growth rate, or a market share you plan to attain. Avoid using vague objectives like "being the best" or "growing rapidly." You should set at least three objectives for your business.

Objective 1

Objective 2

Objective 3

Mission Statement

A mission statement expresses the higher goals of your company, such as providing services to unique industries, spreading new technologies, or improving education. If your company has a mission, state it simply and in one or two sentences.

Company

Summarize your company by briefly explaining what your company sells, through what channels, and to whom.

Company Ownership

Describe the ownership of your company. Is it a partnership, sole proprietorship, or corporation? Is it publicly traded or privately owned?

Company History

Indicate when your company was founded, by whom, and with what purpose. How has it progressed since being founded? When did you relocate offices, expand product lines, or otherwise change substantially? Remember to include information about sales, products/services, and markets serviced as well as how these items have changed over time. If the company is new, state why you have decided to start the business.

Company Location and Facilities

Briefly describe the offices and locations of your company, the nature and function of each, square footage, lease arrangements, and other facilities information.

Product(s)/Service(s)

This paragraph is a summary of the product(s)/service(s) section. Your summary should outline and describe your product(s)/service(s). Describe how the product(s)/service(s) compliment one another or are sold together, if applicable.

Product Description / Service Description

List your product(s)/service(s) individually and describe how they benefit your customers.

Product/Service 1

Product/Service 2

Product/Service 3

Important Product(s)/Service(s) Features and Competitive Comparison

Describe the important competitive features of your product(s) or service(s), or both. Why will people buy your product(s)/service(s) instead of others? Do you offer better features, price, quality, or service? Describe your unique selling feature(s) that gives you an advantage over the competition.

Customer Service / Follow-up Service

Explain how you propose to service the product(s)/service(s) you sell. If your company offers only service(s), change the heading to follow-up service and describe how you intend to provide customer support. Also include your hours of operation as well as your guarantee policy.

Market Analysis

Industry Analysis

The information you provide here will set the scene for the Market Forecast section. Identify and describe the market segments which will affect your business. Use standard information sources to produce an evaluation of current market trends that affect your company's marketing plan.

Market Forecast / Target Market

Discuss your company's position as it relates to other businesses within your market niche. Highlight key elements, including your market size and growth-rate projections.

Keys to Success

Identify unique or "key" selling points that are needed to succeed in your market. These key factors, such as quality, price, or selection, determine your success in business. Fill in each placeholder with one competitive factor, and explain how these selling points relate to your specific target audience.

Competitive Quality 1

Competitive Quality 2

Competitive Quality 3

Business Strategy and Implementation

Introduce your company's overall strategic thrust and describe how you will implement an effective business program. Determine if your strategy is based on a new technology, a new product, or product features; or if its focus is on better marketing, distribution, or services. (Present only one business strategy.)

Advertising

Describe how you plan to advertise/market your new business to your target audience. Include any brochures, direct mail, print advertising, radio advertising, or word-of-mouth strategies you plan to pursue.

Marketing Strategy

When describing strategy, emphasize what makes your company special. For example, your marketing strategy might focus on a specific market segment. Or, it might depend on special ways to distribute the product; on new products that are new solutions to existing problems; or on new ways to promote products or services. What will your company do to be better than other businesses? How will you use advertising to market your product(s)/service(s) to your customers?

Sales Plan

Describe how you sell your products. For example, will you sell your products at retail, wholesale, over the Internet, mail order, or phone order? Will you maintain a sales force? How are salespeople trained and how are they compensated?

Strategic Alliances

Explain how your company handles co-marketing, co-development, commission, and cooperative arrangements. Can you link your promotion or distribution strategies to other companies in a way that improves your company's position?

Organization

Indicate the number of employees and management personnel within your company. Also, specify the number of company founders. Will your company be divided into departments? Explain.

Organizational Structure

Draw a diagram of the organizational structure that your business will have.

Management Team

List the members of your management team. Include summaries—brief resumes—of each member's background and experience and describe their functions within the company.

Name, Position, & Background

Name, Position, & Background

Name, Position, Background

Name, Position, & Background

Management Team Gaps

Identify skills the team does not possess and discuss how the company plans to fill these needs. For example, who will provide legal or tax advice?

Other Management Team Considerations

Describe other criteria that affect your company's business operations. For example, do any managers or employees have "non-compete" agreements with competitors? Also, identify the members of your board of directors (if you have one) and discuss contributions they or any other council make to the business. In addition, list your major stockholders and describe their roles in management.

Financial Analysis

Discuss your company's most significant financial attributes, such as projected cash flow and net profit for the next three years; return on investment; or internal rate of return. Explain any fluctuations that may occur from seasonal sales.

Financial Plan

Along with pro forma projections, you'll need to summarize the important points of your financial plan or strategy. Specify how you intend to finance your business.

Start-Up Costs and Capitalization

This section includes the start-up costs and capitalization tables. Summarize the information in these tables in an introductory paragraph. Highlight the total cost required to start your business, identify your major assets, and/or list your owners and their investments.

Startup / Expansion Cost Worksheet

Company:

City:

Anticipated Expenditures

I. Leasehold Improvements

	Amount Paid by Applicant	Additional Funds Needed	
Electrical			
Plumbing			
General Repairs			
Other			
Subtotal - Leasehold Improvements			

II. Fixed Assets

	Amount Paid by Applicant	Additional Funds Needed	
Furniture / Fixtures			
Computer			
Equipment			
Land / Building			
Vehicle			
Permanent Sign			
Shop Equipment			
Apparel			
Subtotal - Fixed Assets			

III. Prepaid Expenses

	Amount Paid by Applicant	Additional Funds Needed	
Insurance			
License			

Rent Deposit			
Telephone Deposit			
Utilities			
Other			
Subtotal – Prepaid Expenses			

IV. Miscellaneous

	Amount Paid by Applicant	Additional Funds Needed	
Office Supplies			
Advertising			
Inventory			
Working Capital			
Franchise Fee			
Sub-Total - Miscellaneous			

Total Startup / Expansion Cost	
Less Owner's Investment	
Amount of Requested Loan	

Estimate of Monthly Expenditures

Company: _____

Contact: _____ Phone: _____

Please estimate, to the best of your ability, the amount you expect to spend in the expense categories listed below. (All accounts will not necessarily apply to your business). Leave blank those that do not apply.

Fill in the amount for ***ONE MONTH***

Accounts

Trade Materials for Sale: \$ _____

Advertising: \$ _____

Auto Expense: \$ _____

Bank Charges: \$ _____

Commission: \$ _____

Contract Labor: \$ _____

Dues/Subscriptions: \$ _____

Insurance: \$ _____

Janitorial Service: \$ _____

Legal/Professional Services: \$ _____

Maintenance – Repairs: \$ _____

Miscellaneous: \$ _____

Office Expense: \$ _____

Outside Service: \$ _____

Rent: \$ _____

Salaries/Wages (Employees) \$ _____

Personal Drawing of Owner: \$ _____

Telephone: \$ _____

Travel: \$ _____

Utilities: \$ _____

