

Appendix D: Business Plan Outline

I. Mission/Summary (Be brief)

A. Business description

1. Name, type of ownership
2. Location, facility description
3. Product/Service
4. Market and Competition
5. Management expertise - primary business partners

B. Business Goals

1. Projected sales and profit
2. Potential return of investment

C. Summary of financial needs and application of funds

II. The Industry/Market Analysis

A. Description of total market-demographics

B. Industry trends

C. Target markets

D. Competition

III. Products or Services

A. Description of the product line or service

B. Proprietary position: patents, copyrights, and legal and technical considerations

C. Weaknesses

D. Progress of your business idea

IV. Marketing Strategy

A. Overall strategy

1. Who is your customer
2. How many customers?
3. Capture market share

B. Pricing policy

C. Sales terms, servicing products

D. Method of selling/targeting

1. Customer relations
2. Merchandising
3. Advertising
4. Public Relations
5. Image
6. Partnering, strategic alliances
7. Feedback

E. Method of distribution and servicing products

V. Manufacturing/Operations

A. Facility

1. Location
2. Space, equipment
3. Labor analysis

B. Suppliers/Vendor network

C. Production plans

1. Costs-labor, materials, overhead
2. Methods

D. Advantages and disadvantages

VI. Management Team

A. Organizational structure

B. Strengths and weaknesses of each partner

C. Resumes of key personnel

D. Staffing plan

E. Supporting professional services/advisory board

VII. Overall Schedule

A. Timetable

B. Timetable of future directions

VIII. Financial Plan

A. Explanation of start-up capital, revenue streams

B. 3-year financial projections

1. Profit and loss statements
2. Capital expenditure estimates
3. Cash flow chart
4. Balance sheets
5. Sales projections

IX. Proposed Company Offering

A. How much are you going to need and how will you use it?