Business Plan Outline

I. Description of the Business/Executive Summary
   A. Who: Name of business, ownership/management team
   B. What: Type of business, form of business entity, product and service offerings
   C. When: Projected startup date or existing business
   D. Where: Business location, geography served
   E. Why: Customer needs and wants met, market trends, projected financial results
   F. How: Marketing strategy, competitive advantage, sources of capital

II. Marketing Plan
   A. Product and service offerings
      1. Capabilities of your business
      2. Products and services offered
   B. Markets and customers
      1. Markets
      2. Customer segments
      3. Target customers
      4. Customer needs and wants
      5. Customer buying and selection criteria
   C. Competition
      1. Direct and indirect competitors
      2. Competitor strengths and weaknesses
      3. Your source of competitive advantage
   D. Marketing strategy
      1. Product and service packages
      2. Pricing strategy
      3. Location, distribution channels and strategy
      4. Sales and promotion strategy

III. Management Plan
   A. Management team skills and experience
   B. Other key employees and outside advisors
      1. Skills and experience
      2. Compensation
   C. Operations
      1. Organizational chart
      2. Roles and responsibilities
      3. Goals and measurement methods
      4. Key success factors
   D. Resource budgets

IV. Financial Projections
   A. Uses of capital
      1. Startup budget
      2. Income statement (operating budget or pro forma)
      3. Monthly cash flow projection
      4. Balance sheet
   B. Sources of capital

V. Supporting Documents – (Cash flow, Income Statement, Credit Report, Tax Returns, Personal Financial Statement, Legal Documents)