

A SIMPLIFIED BUSINESS PLAN OUTLINE

1. **COVER SHEET**
Name of Business...Name(s) of principals...Address...Phone Number.
2. **TABLE OF CONTENTS**
Identification of sections within the plan by title and page number.
3. **STATEMENT OF PURPOSE**
If for your own use, merely brief description of how and why you intend to use plan...If to be used also as financial proposal, include here brief responses to such questions as: who is asking for money, how much needed, for what it will be used, how the funds will benefit the business, how will loan be repaid.
4. **SUMMARY**
A concise statement giving a quick overview of what is treated in detail within the plan.
5. **THE COMPANY AND ITS OPERATIONS**
Describe business specifically; products or services.
How the product/service is produced and delivered.
Location and size of facility; capacity to produce.
Equipment and space required vs. that available.
Suppliers you intend to use.
Short-term/long-term goals.
Objectives, with estimated completion dates.
6. **MANAGEMENT**
Type organization: sole, partnership, corporation or s corporation.
List manager (s) name, addresses, and phone numbers.
Describe each manager's experience and expertise in brief (place complete resumes in appendix).
Duties of each manager (list job descriptions in appendix).
Other responsibilities (e.g. records) and descriptions.
Number of employees and their jobs.
Percentage of ownership.
7. **MARKETING**
Describe your target segment.
Assessment of past, current, future market size, trends, sales in you targeted area for your kind of product or services.
List primary competitors; their strengths/weaknesses.
Determine your unique competitive advantages.
Pricing your product or services.
Advertising/Promotion.
Describe how contacts will be made and who will make them.
8. **FINANCIAL**
Budgets, Profit/Loss, Balance Sheets, Forecast.
Funds required for your business and sources.
Insurance needs.
Decide whether to use a credit or a cash basis.
Separate bank account.
9. **OTHER**
Accountant, Lawyer, Board of Advisors (if applicable).
Licenses, Permits, Zoning requirements.
10. **APPENDIXES**
Use for such as: personal resumes, credit reports, reference letters, job descriptions, and other items to support and strengthen your plan.