**FILL-IN-THE-BLANK SMALL**

**BUSINESS PLAN TEMPLATE**

BUSINESS PLAN

SMALL BUSINESS ORGANIZATION NAME

PRESENTED TO:

DATE PREPARED

00/00/0000

CONTACT

Contact Name

Contact Email Address

Phone Number

Street Address

City, State and Zip

webaddress.com

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# EXECUTIVE SUMMARY

|  |
| --- |
| The name of our company is \_\_\_\_\_\_\_\_\_\_\_\_\_, and it is organized as a \_\_\_\_\_(corporation, partnership, other)\_\_\_\_. \_\_\_\_(Company Name)\_\_\_ is located in \_\_\_\_\_\_\_\_\_ and has been in business since/and plans to be in business by \_\_\_\_\_\_\_\_\_\_\_. The purpose of this business plan is to \_\_\_\_\_\_\_\_\_\_\_\_\_\_ in order to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .Our Mission: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.Our Vision: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.The managers for \_\_\_(Company Name)\_\_\_ will be \_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_. The experience and skills they bring to the table include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, and\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.Utilizing market research, as well as the combined experience of the management team, we’ve decided to launch \_\_\_(Product or Service)\_\_\_. What makes \_\_\_(Product or Service)\_\_\_ different than what’s currently on the market is \_\_\_\_\_\_\_\_\_\_\_\_. We believe we can maintain a competitive edge because \_\_\_\_\_\_\_\_\_\_.Our customers reside, shop, and work in \_\_\_\_\_\_\_\_\_\_\_, so our business is located within a \_\_\_\_-mile radius. We expect \_\_\_(target customer description)\_\_\_ to make up \_\_% of our sales.We will use a combination of marketing strategies to promote \_\_\_(Product or Service)\_\_\_, including \_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_, and \_\_\_\_\_\_\_\_\_. We also plan to partner with \_\_\_\_\_\_\_\_\_\_ in order to \_\_\_\_\_\_\_\_\_\_. We expect that we will reach a projected amount of $\_\_\_\_\_\_\_\_\_\_\_ in annual sales by the end of the first 12 months. By the end of \_\_\_\_\_\_\_\_\_, we plan to reach a projected amount of $\_\_\_\_\_\_\_\_\_ in sales. |

# COMPANY OVERVIEW

## 2.1 COMPANY BACKGROUND

|  |
| --- |
| \_\_\_(Company Name)\_\_\_ was established because \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Our ultimate goal is to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, and we will know we’ve accomplished that goal when \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |

## 2.2 MANAGEMENT TEAM

|  |
| --- |
| **Last Name, First Name**\_\_\_(Name)\_\_\_ is the \_\_\_(Co-Founder, Manager, etc.)\_\_\_ of \_\_\_(Company Name)\_\_\_. \_\_\_(Name’s)\_\_\_ educational background includes \_\_\_\_\_\_\_\_\_\_\_\_. Their industry-related experience includes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**Last Name, First Name**\_\_\_(Name)\_\_\_ is the \_\_\_(Co-Founder, Manager, etc.)\_\_\_ of \_\_\_(Company Name)\_\_\_. \_\_\_(Name’s)\_\_\_ educational background includes \_\_\_\_\_\_\_\_\_\_\_\_. Their industry-related experience includes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |

# PRODUCTS & SERVICES

|  |
| --- |
| Our \_\_\_(Product or Service’s)\_\_\_ offerings include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Materials needed for \_\_\_\_\_\_\_\_\_\_ will be sourced from \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We plan to leverage the relationships we’ve made with \_\_\_\_\_\_\_\_\_\_\_\_\_\_ to help keep our costs for materials low. We also plan to establish positive working relationships with \_\_\_\_\_\_\_\_\_\_\_\_\_\_ to help with \_\_\_\_\_\_\_\_\_\_\_\_\_\_. Alternatives that are currently on the market include \_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_, and \_\_\_\_\_\_\_\_\_\_\_\_. What makes our \_\_\_(Product or Service)\_\_\_ better than the alternatives is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Some of the unique and desirable features of \_\_\_(Product or Service)\_\_\_ include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  |

Here are some examples of our offerings (insert images below):

|  |
| --- |
|  |

Currently, we use the following suppliers/vendors:

|  |  |
| --- | --- |
| **VENDOR 1** | **VENDOR 2** |
| NAME |  | NAME  |  |
| LOCATION |  | LOCATION |  |
| SUPPLIES PROVIDED TO BUSINESS |  | SUPPLIES PROVIDED TO BUSINESS |  |
| PAYMENT TERMS |  | PAYMENT TERMS |  |

# MARKET ANALYSIS

## 4.1 MARKET & INDUSTRY OVERVIEW

|  |
| --- |
| \_\_\_(Similar Products or Services)\_\_\_ have been prevalent in the \_\_\_\_\_\_\_\_\_\_\_ industry since \_\_\_\_\_\_\_\_. The size of the current market is \_\_\_\_\_\_\_\_\_, and it is projected to grow by \_\_% over the next \_\_\_\_\_\_\_\_\_\_\_. Currently, there are \_\_\_(Number)\_\_\_ direct competitors in and around the \_\_\_(Location of Business)\_\_\_ area. We believe \_\_\_(Company Name)\_\_\_ will be successful in this space because \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We predict that we can gain \_\_% of the market share by the end of \_\_\_\_\_\_\_\_ and \_\_% of the market share within the next \_\_(Number)\_\_\_ years. The trends within this industry show that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  |

## 4.2 TARGET MARKET

## According to our market research, our target customers have the following characteristics in common:

|  |  |
| --- | --- |
| **SEGMENT 1** | **SEGMENT 2** |
| AGE |  | AGE  |  |
| GENDER |  | GENDER |  |
| OCCUPATION |  | OCCUPATION |  |
| INCOME LEVEL |  | INCOME LEVEL |  |
| HIGHEST LEVEL OF EDUCATION |  | HIGHEST LEVEL OF EDUCATION |  |
| MARITAL STATUS |  | MARITAL STATUS |  |

## 4.3 COMPETITION

|  |
| --- |
| Our direct competitor is \_\_\_\_\_\_\_\_\_\_\_\_\_\_(Competitor’s Name)\_\_\_\_\_\_\_\_\_\_\_\_\_\_, which is located in \_\_\_\_\_\_ . They sell \_\_\_(Product or Service)\_\_ at a rate of \_\_\_\_\_\_\_\_\_\_ per \_\_\_\_\_\_\_\_\_. In \_\_\_(Year)\_\_, \_\_\_(Competitor’s Name)\_\_\_’s profit margin was \_\_\_\_\_\_\_\_\_\_\_\_\_\_, compared to the previous year, and has \_\_\_\_\_\_\_\_ by \_\_\_\_\_% since the company began in \_\_\_(Year)\_\_\_. They currently hold a \_\_\_\_\_% market share.Customers buy from this business because \_\_\_\_\_\_\_\_\_\_\_\_\_\_. We are confident that our company can better serve our target market because \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |

# MARKETING PLAN

## 5.1 MARKETING STRATEGY

|  |
| --- |
| In order to grow our initial customer base, our marketing strategy is to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We plan to utilize \_\_\_(marketing channel)\_\_\_ and \_\_\_(marketing channel)\_\_\_ in order to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Additionally, most of our new customers will find us by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. \_\_\_(Company Name)\_\_\_ also plans to reach new and existing customers by using \_\_\_(promotional materials)\_\_\_. Our pricing strategy is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |

## 5.2 POSITIONING

|  |
| --- |
| \_\_\_(Company Name)\_\_\_ plans to position itself as a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ brand. We plan to achieve this by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. When target customers think of our product, we want them to think \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  |

## 5.3 PROMOTION

|  |
| --- |
| We plan to leverage \_\_\_\_\_\_\_\_\_\_\_\_\_\_ in order to promote and grow our business. We also plan to utilize the following types of communication to reach our audience:**Advertising** (if applicable)\_\_\_\_\_\_\_\_\_\_(Add a description of the paid promotional media you will use) \_\_\_\_\_\_\_\_\_\_.**Personal Selling** (if applicable)\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Add a description of your personal selling strategy)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**Marketing Communication Activities** (if applicable)\_\_\_\_\_\_\_\_\_\_\_\_(Add a description of the marketing events or activities you will do)\_\_\_\_\_\_\_\_\_\_\_\_.**Public Relations** (if applicable)\_\_\_\_(Add a description of the efforts you will make to garner positive press)\_\_\_\_. |

## 5.4 DISTRIBUTION

|  |
| --- |
| We plan to get \_\_\_(Product or Service)\_\_\_ to our customers by using the following distribution channels:\_\_\_(Discuss your distribution plan here, including an online store, retail outlets, home delivery, etc.)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.These distribution methods make the most sense for our business because\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. To support our distribution efforts, we will need to form business partnerships with \_\_\_\_\_\_\_\_\_\_\_\_\_\_and\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We plan to do so by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |

# IMPLEMENTATION PLAN

## 6.1 PERSONNEL PLAN

|  |
| --- |
| At this time, the personnel plan calls for a minimum of \_\_\_\_\_(staffing needs)\_\_\_\_\_\_ in order to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We assume that in the first year, we will only have \_\_\_\_\_(number of employees)\_\_\_\_\_\_\_\_\_\_\_ to execute and manage operations. As demand increases, we will purchase additional \_\_\_\_\_\_(infrastructure)\_\_\_\_\_\_\_\_\_ and hire \_\_\_(number of additional staff needed)\_\_\_.  |

|  |  |  |  |
| --- | --- | --- | --- |
| **PERSONNEL** | **YEAR 1** | **YEAR 2** | **YEAR 3** |
| POSITION 1 |  |  |  |
| POSITION 2 |  |  |  |
| POSITION 3 |  |  |  |
| POSITION 4 |  |  |  |
| **TOTAL PAYROLL** |  |  |  |

## 6.2 SWOT ANALYSIS

|  |  |
| --- | --- |
| STRENGTHS (INTERNAL) | WEAKNESSES (INTERNAL) |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |
| OPPORTUNITY (EXTERNAL) | THREATS (EXTERNAL) |
| 1. | 1. |
| 2. | 2. |
| 3. | 3. |

|  |
| --- |
| We plan to capitalize on \_\_\_(strengths)\_\_\_ by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We will address our current weaknesses by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We will use our opportunities to our advantage by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We plan to mitigate the risk of threats by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  |

## 6.3 TIMELINE OF MILESTONES

Below is the timeline we anticipate to complete key activities:

Milestone 4

01/28

Milestone 3

01/25

Milestone 6

02/15

Milestone 4

01/28

Milestone 2

01/18

 Milestone 2

01/18

Milestone 5

02/05

 Milestone 2

01/18

# FINANCIAL PLAN & STATEMENTS

## 7.1 KEY ASSUMPTIONS

|  |
| --- |
| Revenues will increase at a rate of \_\_\_% during the first \_\_\_(time period)\_\_\_, with an increase in sales of \_\_\_% during \_\_\_\_\_\_, due to \_\_\_\_\_\_\_\_(historical data)\_\_\_\_\_\_\_\_\_. We are deliberately calculating lower sales projections in order to illustrate a worst-case scenario.  |

## 7.2 SALES FORECAST

|  |
| --- |
| The expected average monthly sales total for the first \_\_\_(number)\_\_\_ years will be $\_\_\_\_\_\_\_\_. In our sales forecast, we expect the highest performance during \_\_\_\_\_\_\_\_\_\_\_\_\_\_, due to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. We anticipate an average sale of $\_\_\_\_\_\_\_ per customer. |

Below, insert a chart and/or graph depicting your sales forecasts:

|  |
| --- |
|  |

## 7.3 BREAK-EVEN ANALYSIS

|  |
| --- |
| We expect our break-even point to be \_\_(dollar volume in sales)\_\_, which will occur in \_\_\_(Month/Year)\_\_\_.  |

Below, insert a chart and/or graph depicting your break-even point:

|  |
| --- |
|  |

## 7.4 PROJECTED INCOME STATEMENT

Insert your projected income statement below:

|  |
| --- |
|  |

## 7.5 PROJECTED CASH FLOW STATEMENT

Insert your projected cash flow statement below:

|  |
| --- |
|  |

## 7.6 PROJECTED BALANCE SHEET

Insert your projected balance sheet below:

|  |
| --- |
|  |

# APPENDIX

|  |
| --- |
| Attached below, please see the documents that support the information we’ve provided in this plan. These documents include \_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_, and \_\_\_\_\_\_\_\_\_\_\_\_\_\_.Possible items to attach:• Detailed market research• Resumes of key people• Industry information• Professional references• Supporting material |

|  |
| --- |
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