

# BUSINESS PLAN TEMPLATE

*A Customizable Business Plan*

Starting  
Your  
Business  
Dream



# FILLABLE BUSINESS PLAN TEMPLATE

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How exciting! You've decided to write a business plan. You can use this template to write a great one that covers all of the bases. But before you begin to write, here are some instructions that will make it easier for you:

1. Type in the required information and then delete the instructions.
2. If there is a section of the business plan that you aren't filling out, delete any headings that won't be used or aren't applicable to you.
3. Although the Executive Summary heading is first, you will fill this in last. Just skip it when you start out and return to it at the end.
4. Refer to your Business Plan Workbook when filling in the template. For example: in the section titled "Your Big Idea", your notes should help you write out the description of your business.

**Your Company Name**

**Your Name**

**Date**

# EXECUTIVE SUMMARY

*The Executive Summary tells your story in a way that grabs your reader's interest -- hopefully, enough that they will read your whole plan. You would write this section last, including highlights from the sections you already wrote. An Executive Summary should be ½ - 1 page long. In that short amount of space, write about: what your business is, who you are (i.e., your experience), what makes your business unique, who your customer is, how you would get customers, and how much money you project you would make in your first year. If you have already found some customers who are waiting to do business with you mention that as well. Remember, your Executive Summary should make your business sound likely to succeed, and interesting enough to make people (from potential investors to future customers) want to learn more about it.*

# BUSINESS DESCRIPTION

*What are your services or your products? Describe these in detail. Also describe what will make your business different or unique.*

# THE OWNER/OPERATOR

*Tell the reader who you are, what experience you have had with this service or product, and why you are starting this business.*

# MARKET RESEARCH

*Summarize the results of your market research, including peer and customer research.*

# THE COMPETITION

*How many competitors do you have? Who are the main ones? What do they offer and charge? What else did you learn from your competitive research?*

# REFERRAL PARTNERS

*Do you know people or business owners who could send customers your way? Make a list of referral partners you already have and add a column for those you would like to have.*

# PROFESSIONAL ASSISTANCE

*Who will do your bookkeeping? Who will be assisting you with other aspects of your business that you can't handle on your own?*

# THE CUSTOMER

*Who is your target customer? Are they a type of business or a kind of person or both? What did you learn about your customer when you did your research?*

# MARKETING AND PROMOTION

*How will you market and promote your business? Will you have a website and use social media? Will you network, share printed marketing materials, make sales calls? Use the template below to list each mode of marketing and what it will cost and what promotional ideas you have.*



*If you have a product, how will it get into your customers' hands? If it is a service, describe how you will perform that service in detail.*

## **CUSTOMER SERVICE**

*What is your customer service goal and how will you deliver great customer service? Will you be on time, follow up after the service, send holiday cards, etc.?*

## **FINANCIAL PLAN**

## **PRICE**

*What will you charge for your product or service? How does this price compare with your competition? How will you accept the money? Will you be accepting credit cards or e-transfers? Will a deposit be necessary?*

## **START-UP COSTS**

*Describe what your start up costs will be and where the funds will come from.*

# CASH FLOW

*Insert your cash flow sheet here.*

# THE PERSONAL BUDGET PAGE

*Insert your personal budget page here.*