

[Company Name]

Address Line 1

Address Line 2

State and Post Code

info@comany.com

www.comany.com

Company Representative

Your Name



Business Plan

Business Plan for Start Up

Development of Business for your concept

Prepared for:

Name of Lender

Company Of Lender

Address of Lender

P 1300 000 000 E info@lender.com

Date Issued:

01.01.2020

Statement of Confidentiality

This proposal and supporting materials contain confidential and proprietary business information of [Company Name]. These materials may be printed or photocopied for use in evaluating the proposed project, but are not to be shared with other parties.



Executive Summary

Summarize the sections below to give your bank/investor a brief and compelling synopsis of your business.

This section should be informative enough that the reader knows who you are, what you're doing, why you're doing it, and how much money you need to accomplish your goals.

However, this section should also be short enough that it is an easy read and compelling. How you order this information is up to you, but make sure you hit the key points that are elaborated in later sections.

Keep in mind that your bank lender/investor might only read this section. Try not to exceed one page in length.

Notes:

When summarizing your business, it is important to convey how you are unique or why your product or service is needed. The summary should tell the reader what you want. This is very important. All too often, what the business owner desires is buried on page eight. Clearly state what you're asking for in the summary.



We will work with you to fully understand your business and your target audience to inform our marketing strategy. Using the outcomes from the Company Analysis, we will put together a plan for the most effective marketing strategy to get the best results for your business



About Us

This section needs to give a complete understanding of the identity of your company. Who are you? Who owns your company? Where are you located? What is your company history? What spurred the idea of your company?

What is your company philosophy? What are your company goals and objectives?

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The Business Concept



COMPANY NAME will be a _____ store focused on serving _____ in **CITY, STATE** or **AREA**. Beyond its products, the Company will also provide _____ and _____. The store will have a _____ atmosphere, with _____ décor, both inside and out, creating an eye-catching storefront that attracts window shoppers in the area. **COMPANY NAME's** products and services are listed below (list products by category).

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Product Category

» Product 1	Primary
» Product 2	Secondary
» Product 3	Upsell



Our Services

This section should be devoted to what services you provide or what products you will be selling. To brainstorm for this section, draw up a list of all your products and services, then figure out what you want to focus on.

. Organize this information along with some paragraphs about your priorities (customer service? sales? green building? recreational living? premium pricing?). Anything goes here, it just depends on what your company has to offer.

COMPANY NAME will be the newest _____ store in the area. These products have become increasingly popular in recent years, as people seek greater _____ in their lives. **COMPANY NAME's** products are described in further detail below.

Note:

If your company sells cupcakes, this is a good place to talk about how great cupcakes are. If you sell used clothing, talk about how people like to save money while still looking great.

Go into further detail in these sections. For a cupcake shop, list the different flavors of cupcakes you'll sell, etc.

This is the part of the plan where you can talk about your neighborhood's attractions and demographic traits. Mention things like anchor stores, street walk-ability, and income traits.



Our Products

We want you to feel informed and empowered. Below we have outlined in detail what each of our products has to offer:

1 Product 1



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2 Product 2



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Product Description Continued

3 Product 3



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Design is in everything we make, but it's also between those things. It's a mix of craft, science, storytelling, propaganda, and philosophy. A designer knows he has achieved perfection not when there is nothing left



Our Market Strategy

Who is your market? To tackle this section, you need to first identify who your prospective customer is. Male? Female? Old? Young? Everyone? Even if your product or service is relevant for everyone, in order to figure out who your market is, you must first determine who is most likely to purchase your product or service. If you don't know this off the top of your head, a little research can help. Try reading up in business magazines or pay attention to who's getting targeted by businesses that have a similar product to your own.

Once you determine who your target market is, you can get concrete data about where they are. For local businesses (especially retail), visit your area's Chamber of Commerce and consult your local library for information on local demographics. Also, create a profile of how businesses similar to your own have fared in recent years. Consult industry association's specific to your business or purchase research reports from companies like Marketresearch.com, IDC, Plunkett Research, PricewaterhouseCoopers, and others.

Newspaper and magazine articles that talk about the market for your business are also good resources. As you are creating an overview of this information, be careful not to plagiarize these sources or paste entire articles into this section. Plagiarism is illegal, and can be easily caught in today's information age. Be sure you cite all facts with footnotes.¹



¹ Author last name, Author First Name. Book. Chapter Title / Magazine Title. "Article Title." Web URL. Date Written.



Competitive Analysis

Finally, discuss your competition. Analyze their strengths and weaknesses and then talk about your company's advantages over these competitors.

COMPANY NAME will be located in the _____ neighborhood of **CITY, STATE**. This area is notable for its _____. The chart below shows population and demographic statistics for this area.

[INSERT DEMOGRAPHIC CHART HERE]

[INSERT RESEARCH FINDINGS HERE]

COMPANY NAME will target area residents that have the following traits:

- ✧ (FILL IN AGE)
- ✧ (FILL IN INCOME)
- ✧ (FILL IN OTHER TRAITS)

COMPANY NAME will compete with other businesses that sell _____ in the same neighborhood. This includes **COMPETITOR 1, COMPETITOR 2 & COMPETITOR 3**. The strengths and weaknesses of these competitors are listed below.

Competitors

» Competitor 1 - Strength / Weakness

» Competitor 2 - Strength / Weakness

» Competitor 3 - Strength / Weakness



Our Marketing Plan

Your marketing plan is very important because it covers a) how to get your product/service to your customer, and b) how to generate buzz about your company so that people think of you when they think of your product or service.

First, figure out how you can capitalize on the advantages you have over your competitors. These strengths will help you figure out what you want to emphasize in your marketing campaign.

Next, answer the question: What are the best avenues to market my product or service? If you are targeting other businesses, direct sales might be a good idea. If you are targeting the public, figure out what kind of advertising your target market will most likely respond to. Television ads? Magazine displays? Banner ads online? Cold calling? There are literally hundreds of ways to market your product or service. The key is determining what forms of advertising will be the most effective for you.

Go into further detail in these sections by including information about how you will implement each advertising method. Will you hire a PR firm? Will you create your own television commercials? On what stations will you advertise? (Example on next page of what this page would read like).

Note:

Traditional advertising methods include direct sales, television ads, print ads, radio ads, and others. Viral advertising methods include word of mouth, online advertisements, e-mail blasts, and things like brochures that can get passed around.

Would business-to-business (B2B) or business-to-consumer (B2C) advertising methods be best for you? Or both?

This is the part of the plan where you can talk about your neighborhood's attractions and demographic traits. Mention things like anchor stores, street walk-ability, and income traits.



Our Marketing Plan continued

COMPANY NAME will market its products and services using a combination of **TRADITIONAL AND/OR VIRAL** advertising methods. To best attract its targeted **BUSINESSES AND/OR CONSUMERS**, **COMPANY NAME** will formulate its advertising strategy to maximize results while minimizing budget expenditures. The Company's promotional strategy is further detailed below:

Traditional Advertising Methods:

- | | |
|-----------------------|----------------------|
| » Advertising Method: | Promotional Strategy |
| » Advertising Method: | Promotional Strategy |
| » Advertising Method: | Promotional Strategy |

Viral Advertising Methods:

- | | |
|-----------------------|----------------------|
| » Advertising Method: | Promotional Strategy |
| » Advertising Method: | Promotional Strategy |
| » Advertising Method: | Promotional Strategy |



Management & Founders

In this section, create a profile of the Company's management and what experience they bring to the table. Add your own text here to support your team of professionals & or experience.

Boss Man



Position:
Experience:

History, Position and relevant Information

In this section, create a profile of the Company's management and what experience they bring to the table.

The Other Guy



Position:
Experience:

History, Position and relevant Information

In this section, create a profile of the Company's management and what experience they bring to the table.

Joe Blogs



Position:
Experience:

History, Position and relevant Information

In this section, create a profile of the Company's management and what experience they bring to the table.



Financials

Where is the money coming from? When? How? What sort of projections should you create and what should you take into consideration?

Income Statement						
		Year 1	Year 2	Year 3	Year 4	Year 5
Revenue		\$0	\$0	\$0	\$0	\$0
Cost of Sales	65%	\$0	\$0	\$0	\$0	\$0
Gross Profit		\$0	\$0	\$0	\$0	\$0
		0%	0%	0%	0%	0%
Expenses						
Marketing & Advertising	15%	\$0	\$0	\$0	\$0	\$0
Rent & Utilities		\$0	\$0	\$0	\$0	\$0
Travel & Entertainment		\$0	\$0	\$0	\$0	\$0
Fees & Outside Services		\$0	\$0	\$0	\$0	\$0
Research & Development		\$0	\$0	\$0	\$0	\$0
Wages & Benefits		\$0	\$0	\$0	\$0	\$0
Total Operating Expenses		\$0	\$0	\$0	\$0	\$0
Operating Profit		\$0	\$0	\$0	\$0	\$0
		0%	0%	0%	0%	0%
Interest		\$0	\$0	\$0	\$0	\$0
Depreciation		\$0	\$0	\$0	\$0	\$0
Profit Before Taxes		\$0	\$0	\$0	\$0	\$0
Taxes on Income	35%	\$0	\$0	\$0	\$0	\$0
Net Profit		\$0	\$0	\$0	\$0	\$0
		0%	0%	0%	0%	0%
Statement of Cash Flow						
		Year 1	Year 2	Year 3	Year 4	Year 5
Investment Received		\$0	\$0	\$0	\$0	\$0
Loans Received		\$0	\$0	\$0	\$0	\$0
Revenue		\$0	\$0	\$0	\$0	\$0
Cash Received		\$0	\$0	\$0	\$0	\$0
Assets Purchased		\$0	\$0	\$0	\$0	\$0
Bill Payments		\$0	\$0	\$0	\$0	\$0
Principle Repayment		\$0	\$0	\$0	\$0	\$0
Cash Received		\$0	\$0	\$0	\$0	\$0
Cash Flow		\$0	\$0	\$0	\$0	\$0
Cash Balance		\$0	\$0	\$0	\$0	\$0



Instructions:

Double-click on the table

1. Fill in the "Revenue" line for Years 1 through 5.
2. For "Cost of Sales," you can change the placeholder number (ex: 65%) to calculate your direct costs of sales. Alternately, you can delete the placeholder itself and input your own direct costs for Years 1 through 5.
(Note: You can change the titles under "Expenses" to whatever you prefer.)
3. "Marketing & Advertising" can be modified in the same manner as "Cost of Sales."
4. You can fill in your other expenses in Years 1 through 5. Alternately, Years 2 through 5 are set in the table to grow by 5% per year.
5. The long-term assets (such as equipment and property) can be filled in at the "Assets Purchased" line. The depreciation schedule for those assets can be calculated and filled in at the "Depreciation" line.
6. "Investment Received" and "Loans Received" can be changed to whatever amount you need. Make sure you seek enough funding to keep your "Cash Balance" positive; you must never have a negative cash balance.
7. If you are seeking a loan, your "Interest" and "Principle Repayment" can be calculated by using an amortization calculator at: <https://www.nab.com.au/business/calculators>

That's it from me. My only suggestion is to add a table of contents once you have finished editing.

I hope this template helped you, if so please leave me a [comment or even suggestions of content to add](#), Happy editing! I would love to see your end results!

Regards & best of luck in your new venture,

Suzie Fox

[Company Name]

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Company Representative

Your Name



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