

Outline of a Business Plan

The following outline is for your use to create a simple and functional business plan. If you plan to use your business plan to obtain funding from a bank or other investors, it is important to include EVERYTHING listed in the outline. However, if the plan is to be used by an entrepreneur as a road map for his or her business, it should be written with the goals of the business in mind and you do not have to spend a lot of time preparing information for others to read and judge. Attention to the objectives of each goal and steps to achieve those goals must be included. Practical financial projections are necessary.

Elements of a Business Plan

1. Description of Business

- a. Company description
 - i. Legal company name, dba's, brand names, model names, web domain names, legal form of company, ownership, business location(s), patents, etc.
- b. Company mission and vision and values
 - i. Statement of company purpose or objective
 - ii. Long term vision, goals, business strategies
 - iii. Value statement of the firm
- c. Market opportunity or concept
 - i. Description of your industry
 1. industry maturity, seasonality affects, economic factors, government regulations, technology advances
 - ii. Industry analysis and trends
 1. size and growth of your industry
 2. distribution channels
 - iii. Strategic opportunities within the industry
- d. Stage of development
 - i. Clear sense of how far along the company is in terms of development, customers, revenue, technology, etc.
- e. Overview of products and services
 - i. Description of all products and services. What need do they fill? How do they save time or money? Why should someone buy?

- f. Milestones
 - i. Outline of milestones achieved to date
 - ii. Future milestones to measure success
- g. Community involvement and social responsibility
- h. Exit plan

2. Marketing

- a. Target market
 - i. Thorough understanding of your customers
 - ii. Distinct, meaningful characteristics of market segments
 - iii. Demographic information
- b. Marketing and sales strategy
 - i. Market size and trends
 - ii. Your company's message (product, price, promotion and place)
 - iii. Marketing vehicles and tactics
 - iv. Marketing budget
 - v. Sales structure and channels (sales personnel and process)
 - vi. Sales projections
- c. Competition and market research
 - i. Competitive assessment
 - ii. Customer perceptions
 - iii. Competitive operational factors
 - iv. Market share distribution
 - v. Future competitors
- d. SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats)
 - i. Your strategic position (advantages and barriers)
 - ii. Risk analysis

3. Operations

- a. Day to day functions of your company
- b. Facilities
- c. Production plans
- d. Supply and distribution
- e. Order fulfillment
- f. Customer service

- g. Research and development
- h. Financial control
- i. Technology plan and budget

4. Management and Organization

- a. Histories and capabilities of management team
- b. Personnel requirements
- c. Compensations and incentives
- d. Board of Directors, Advisory Boards and Consultants
- e. Management style

5. Finances

- a. Income Statement
- b. Cash Flow Projections
- c. Balance Sheet
- d. Break-even Analysis
- e. Sources and uses of funds



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With 25 years of marketing and business development experience in high-tech, software, ecommerce, financial, manufacturing and medical companies, Maureen's expertise is strategic planning and business model development for small to medium businesses. She also has experience in product management, new product launches, pricing models, marketing communication programs, product positioning and event management.

As a consultant, Mo most often works in engagements with emphasis on strategic planning, crafting business plans, developing and executing marketing plans, and new product launches. Mo also is the founder and facilitator of peer advisory groups. The m.b.a. (momentum board of advisors) is an informal board of directors for small businesses, start up business and solo entrepreneurs. Kanwischer is a licensee of EWF International® a peer advisory group dedicated to women business owners and executives.

Recognized for her public speaking ability, she has been a sought after speaker and is a fanatic for client care and customer satisfaction. Maureen holds a Bachelor of Science degree from Alfred University in New York and earned an Executive MBA from the State University of New York.