

# Small Business Business Plan Template

Tip: Replace the placeholder text in [brackets] and delete the guidance notes once you're done.

## 1. Cover Page

- **Business Name:** \_\_\_\_\_
- **Tagline (optional):** \_\_\_\_\_
- **Your Name & Role:** \_\_\_\_\_
- **Date:** \_\_\_\_\_
- **Contact Info:**
  - Email: \_\_\_\_\_
  - Phone: \_\_\_\_\_
  - Website / Social: \_\_\_\_\_

## 2. Executive Summary

Write this section last – it's a 1–2 page overview of the whole plan.

- **Business Overview (what you do in 2–3 sentences):**

Example: "We are a [type of business] in [location] offering [products/services] to [target customers]."

- **Mission Statement (why your business exists):**

- **Vision (where you want to be in 3–5 years):**

- **Top 3 Business Goals (next 12–24 months):**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- **Summary of Financial Outlook:**

- Year 1 projected revenue: \$ \_\_\_\_\_
- Estimated monthly break-even point: \$ \_\_\_\_\_

### 3. Business Overview

- **Legal Structure:**
  - [Sole proprietor / Partnership / LLC / Corporation / Other]
- **Location:**
  - Physical address or “online / remote”: \_\_\_\_\_
- **Business History (if existing):**

When you started, major milestones so far.

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- **Products/Services (short list):**
    - Product/Service 1: \_\_\_\_\_
    - Product/Service 2: \_\_\_\_\_
    - Product/Service 3: \_\_\_\_\_

### 4. Problem & Solution

- **Customer Problem(s) You Solve:**

What frustrations, needs, or pains do your customers have?

- Problem 1: \_\_\_\_\_
- Problem 2: \_\_\_\_\_
- **Your Solution (how you solve these problems):**

Clear 2–4 sentence explanation.

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- **Your Unique Value Proposition (why choose you vs others):**

Example: “We offer [benefit] for [target customer] so they can [result], unlike [competitors] who [weakness].”

# 5. Market & Customer Analysis

## 5.1 Target Market

- **Primary Market (who you serve):**

Example: "Local homeowners in [city] needing..."

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- **Ideal Customer Profile(s):**

- Age range: \_\_\_\_\_
- Gender (if relevant): \_\_\_\_\_
- Location: \_\_\_\_\_
- Income range (if relevant): \_\_\_\_\_
- Occupation / Business type: \_\_\_\_\_
- Key needs/pain points:
  - \_\_\_\_\_
  - \_\_\_\_\_

## 5.2 Market Size & Trends (simple version)

- **Your Service Area / Niche:** \_\_\_\_\_
- **Relevant Trends (3–5 bullets):**
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_

# 6. Competitor & Advantage Analysis

- **Top 3–5 Competitors (local or online):**

Competitor	What They Offer	Strengths	Weaknesses
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**How You're Different (3–5 bullet points):**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 7. Products & Services

For each main product/service, list:

### Product/Service 1: [Name]

- Description: \_\_\_\_\_
- Main benefit to customer: \_\_\_\_\_
- Price: \$ \_\_\_\_\_
- Cost to deliver (if known): \$ \_\_\_\_\_
- Delivery method (in-person, online, shipped, etc.): \_\_\_\_\_

### Product/Service 2: [Name]

- Description: \_\_\_\_\_
- Main benefit: \_\_\_\_\_
- Price: \$ \_\_\_\_\_
- Cost to deliver: \$ \_\_\_\_\_

*(Add more as needed.)*

- **Upsells / Add-ons / Packages (if any):**

\_\_\_\_\_

## 8. Business Model (How You Make Money)

- **Revenue Streams:**

Example: one-time sales, subscriptions, retainers, classes, etc.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- **Pricing Strategy:**

- Positioning: [Budget / Mid-range / Premium]
- Brief explanation of why:  
\_\_\_\_\_

- **Sales Volume Assumptions (per month, rough):**

- Expected number of customers: \_\_\_\_\_
- Average sale per customer: \$ \_\_\_\_\_

## 9. Marketing & Sales Plan

### 9.1 Marketing Strategy

- **Brand Positioning (how you want to be seen):**  
\_\_\_\_\_

- **Key Messages (what you want people to remember):**

- \_\_\_\_\_
- \_\_\_\_\_

- **Main Marketing Channels (pick 3–5):**

- Website / SEO
- Google Business Profile
- Social media (specify platforms): \_\_\_\_\_
- Email marketing
- Local networking / events
- Online ads (Google / Facebook / Instagram, etc.)
- Partnerships / referrals

- **Simple 90-Day Marketing Plan (high-level):**

- Month 1 focus: \_\_\_\_\_
- Month 2 focus: \_\_\_\_\_
- Month 3 focus: \_\_\_\_\_

### 9.2 Sales Process

- **How Customers Find You:**

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- **Sales Steps (example: Inquiry → Quote → Follow-Up → Close):**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

- **Follow-Up Method (email, phone, CRM, etc.):**

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## 10. Operations Plan

- **Location & Facilities:**

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- **Key Tools & Software:**

Example: accounting software, booking tools, CRM, POS.

- \_\_\_\_\_
- \_\_\_\_\_

- **Suppliers / Partners (if relevant):**

- Supplier/Partner: \_\_\_\_\_ – Role: \_\_\_\_\_
- Supplier/Partner: \_\_\_\_\_ – Role: \_\_\_\_\_

- **Core Processes (briefly describe):**

- How you deliver your product/service:  
\_\_\_\_\_
- How you handle customer support:  
\_\_\_\_\_
- How you manage quality control:  
\_\_\_\_\_

## 11. Team & Organization

- **Owner(s):**

- Name: \_\_\_\_\_ – Role: \_\_\_\_\_

- **Current Staff / Contractors:**

Name	Role	Full-time/Part-time	Main Responsibilities
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- **Planned Future Hires (next 12–24 months):**

- Role: \_\_\_\_\_ – Target hire date: \_\_\_\_\_
- Role: \_\_\_\_\_ – Target hire date: \_\_\_\_\_

## 12. Financial Plan (Simple Version)

It's wise to review this section with an accountant or bookkeeper.

### 12.1 Startup Costs (if new business)

- Equipment: \$ \_\_\_\_\_
- Licenses/permits: \$ \_\_\_\_\_
- Initial inventory: \$ \_\_\_\_\_
- Branding/website: \$ \_\_\_\_\_
- Legal/accounting setup: \$ \_\_\_\_\_
- Other: \$ \_\_\_\_\_

**Total Startup Costs:** \$ \_\_\_\_\_

### 12.2 Monthly Operating Expenses

- Rent / utilities: \$ \_\_\_\_\_
- Payroll / contractor fees: \$ \_\_\_\_\_
- Software / subscriptions: \$ \_\_\_\_\_
- Marketing / advertising: \$ \_\_\_\_\_
- Insurance: \$ \_\_\_\_\_
- Loan repayments: \$ \_\_\_\_\_
- Other: \$ \_\_\_\_\_

**Total Monthly Expenses:** \$ \_\_\_\_\_

### 12.3 Revenue Projections (Year 1)

- Expected average monthly revenue: \$ \_\_\_\_\_
- Expected annual revenue (rough): \$ \_\_\_\_\_

### 12.4 Break-Even Point

- Monthly expenses: \$ \_\_\_\_\_
- Average profit per sale: \$ \_\_\_\_\_

Break-even sales needed per month = Monthly expenses ÷ Profit per sale.  
(Have a financial professional help you finalize this.)

## 13. Milestones & Key Metrics

- **Top 5 Milestones (next 12–24 months):**
  - \_\_\_\_\_ by [date]
  - \_\_\_\_\_ by [date]
  - \_\_\_\_\_ by [date]
- **Key Metrics You'll Track (KPIs):**
  - Monthly revenue target: \$ \_\_\_\_\_
  - Number of new customers per month: \_\_\_\_\_
  - Customer retention / repeat rate: \_\_\_\_\_ %
  - Website traffic / leads (if relevant): \_\_\_\_\_

## 14. Risks & Contingency Plans

- **Main Risks (internal and external):**
  - Risk 1: \_\_\_\_\_
    - Mitigation plan: \_\_\_\_\_
  - Risk 2: \_\_\_\_\_
    - Mitigation plan: \_\_\_\_\_
- **Backup / Plan B Options:**

Example: cut certain costs, switch to online-only, etc.

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## **15. Appendix (Optional)**

Attach or list:

- Resumes of owners/key staff
- Product photos or catalogs
- Sample marketing materials
- Detailed financial projections
- Licenses, permits, or certifications