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## **1. Executive Summary**

The executive summary section of a business plan is a summary of the highlights of your business plan. Even though the topic appears first in the printed document the writing of the executive summary is not written until the plan is completed. This summary is a brief two or three page recap of the rest of the plan. It is essential to carefully prepare this outline so that your target readers will want to read the complete plan.

## **2. Introduction**

Within the Introduction there should be an outline that provides a legal description of the business, the primary products or services manufactured or sold and the primary benefit offered to consumers.

The introduction will also include information about the location of major facilities that form the organization. There should also be a profile of key executives that direct the business.

A brief history of the business growth and development will provide the reader with background on the success achieved since the business was originated.

## **3. Business Review**

The Business Review is the blueprint for the future success of the company. Goals and general purpose or positioning of the company are outlined in general terms.

The review section can also provide a detailed outline of progress since the business was originated.

## **4. Market Analysis**

The environment within which the business operates is described in this section. This should include an analysis of the total market, trends in product development, consumer behaviour, and activity of major competitors.

A description of how the products or services offered by the company provide a competitive advantage as compared with competition is included to inform readers of the benefits and strengths the company has as compared to major competition.

## **5. Vision and Mission Statements**

The Vision Statement defines the organizations purpose in terms of the values of the organization and its ownership/management group.

This statement shapes employees and customers understanding of the company and how it is expected to behave.

The Mission Statement defines the organizations purpose and primary objectives for the short term.

## **6. Financial Plan**

The Financial Plan provides a three to five year outline of total income and profit expectations for the business. It supports the overall mission and provides a basic structure for functional departments to work within.

This plan sets expectations for product pricing, total revenues and profit levels to be achieved.

## **7. Sales and Marketing Plan**

This section will begin with a description of the marketplace including Industry data, the size of the market, identity of key competitors, and the key target consumers to be addressed in marketing activity.

Each product/service would have a positioning statement that clearly identifies the key attributes of the product/service and the target market to be addressed as potential buyers.

Market share objectives supported by pricing, advertising, promotion, and other details of marketing support will be added elements

## **8. Organization Plan**

The Organization Plan identifies the key members of the management or ownership group. This would include the senior management team as well as key department heads. Reporting relationships can be outlined using an organization chart. Also, charts of individual departments may be developed if it is deemed necessary.

Brief descriptions of the major responsibilities should be included in order to ensure roles are clear and accountability for results can be properly assigned.

## **9. Budget**

Every business plan should include a budget for the operating year the plan is addressing. The budget is a condensed version of the financial plan and provides each functional area the opportunity to monitor their share of operating activity. Budgets can be divided into monthly or quarterly segments in order to have timely reports on progress of actual performance against the plan.

## **10. Appendix**

The appendix can include any reference documents used as base data in developing the plan. Some articles that might be in the appendix include:

- **Historical financial statements**
- **Profiles of competition**
- **Industry data**
- **Demographic data and trends**
- **Government legislation or key regulations affecting the business plan.**

Within the book each of these topics are covered in detail. I trust you will want to purchase a copy for your planning.