



## COMPREHENSIVE BUSINESS PLAN OUTLINE

### Title Page

- Your Company's Name, Address, Phone, Fax, email, and web site address.
- Owners or owners-to-be
- Prepared by ...
- List contact information for someone to answer questions about the plan.
- Personalize where submitted to a prospective stakeholder.

### I. Non-Disclosure Agreement (where appropriate)

### II. Table of Contents

### III. Executive Summary

- This is a one to three page highlight of the business concept
- Demonstrate management expertise, and market potential
- Provide sales and profit forecast and financing needed

### IV. Operations Plan

- A. Business Concept
  - Type and size of business
  - History (if any)
  - The product/service and what makes it unique
  - General description of customers
  - Patents/Copyrights (if any)
- B. Production/Service Plan (typical cycle in your business operations)
- C. The Facility
- D. Suppliers

### V. The Market

- Market size-past and projected
- Market trends-future
- Products in the market
- Market players
- Market segments and growth potential
- Market distribution methods
- Competitive analysis

## **VI. Market Strategy/Implementation**

- Target market by segment; identify your niche
- Pricing strategy, such as lowest priced, value priced, or premium priced.  
There are three Briefs on pricing; see 7.00 (Retail), 7.01 (Services), 7.02 (Manufacture)
- Desired company image
- Advertising and public relations
- Methods of selling and servicing, distribution channels to be used
- Warranty policies

## **VII. Products/Services**

- Describe the product/service
- What is its competitive advantage/disadvantage?
- Identify the costs involved; set necessary margin amount
- Explore future Products/Services

## **VIII. Research & Development (where applicable)**

### **Operations**

- Facilities requirements
- Labor requirements
- Production options
- Capital needs, equipment list
- Controls and other considerations

## **X. Management**

- The Management Team
- Legal structure of the business
- Personnel hired, and expected to be hired
- Business advisors

## **XI. Goals and Milestones**

- A statement of business objectives
- A listing of measurable near-term and long-term goals
- Milestone dates.

## **XII. Financial**

- A. Current Conditions
  - Personal financial statement
  - Past tax reports
  - Historical financial statements of the business, where applicable  
(balance sheets, profit and loss and cash flow statements).
- B. Forecasts (three to five years)
  - Profit and loss statements
  - Balance sheets
  - Cash flow forecasts
  - Changes in Shareholders' Equity
- C.
  - Request for financing, sources and uses of funds

*If you would like to request a Cincinnati SCORE counselor please [click here](#).*

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