



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](#).

Disclaimer

The information contained in these briefs is for general information only. While we endeavor to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability or availability with respect to the information, products, services, or related graphics contained in the briefs. Through these briefs you may be able to link to other websites which are not under the control of SCORE therefore the inclusion of any links does not necessarily imply a recommendation or endorse the views expressed within them. Any reference from SCORE to a specific commercial product, process or service **does not constitute or imply an endorsement** by SCORE or SBA or SCORE Chapter 34 or the United States Government of the product, process, or service or its producer or provider.