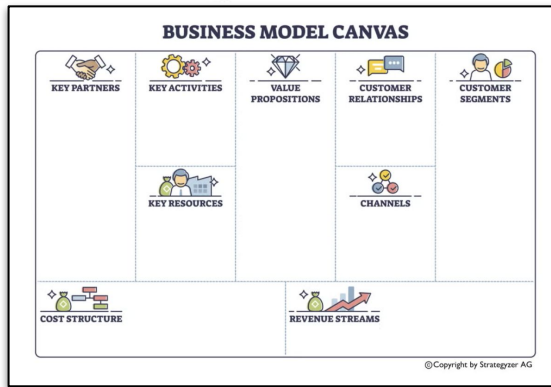


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# Basics of Building a Business Plan

WITH SCORE MENTOR RICH CHENEY

# Overview of Presentation



- Basic Business Elements of the Business Plan- Bank or Simple
- Products Services and Value Proposition
- Market Analysis and Marketing Strategy
- Operational and Organizational Structure
- Financial Plan and Documentation

# I. Executive Summary & Business Overview

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- Executive Summary:
  - Basic Information: name, location, etc...
  - Competitive advantage: unique selling proposition or value delivered
    - Market context: How well do current competitors serve customer needs

# I. Executive Summary & Business Overview

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LEGAL



- General Description:
  - Legal structure(Sole Prop, LLC, S-Corp, C-Corp)
  - History and the background of the business
  - Purpose: Core products service and customer base

# I. Executive Summary & Business Overview

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- Financial status
  - Business Health
  - Short/long-term goals



## II. Products, Services & Value Proposition

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Product/Service overview: features, benefits, development stage

- Physical nature of offerings (photos, brochures, etc.)
- Price, quality, and benefits to customers
- Stage of development if not yet finalized

## II. Products, Services & Value Proposition

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Unique value & competitive positioning

- Differentiation and advantages over competitors
- Proprietary assets (patents, trademarks, licenses, territories)
- Ability to innovate, remain responsive, and stay flexible

## II. Products, Services & Value Proposition

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Rationale for business need & market gap

- Market gaps, underserved segments, or lack of equilibrium
- Barriers to entry and viability of reaching target customers
- Confirmation that the market has purchasing power

# III. Market & Industry Analysis

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- Market & industry trends and market landscape
- Target demographics
- Market size, share potential, and customer acquisition rationale
- Formal or informal market research findings
- Competitor SWOT

# III. Marketing and Sales Strategy

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- Selling methods
- Pricing strategy
- Advertising, promotion and brand communication
- Customer service plan for retention and repeat business

## IV. Operations & Organizational Structure

### Operational plan: location, equipment, staffing

- Business location, facility layout, and equipment needs
- Labor requirements, staffing, and wage structure
- Inventory systems and quality control processes
- Supplier relationships including terms, costs, and availability

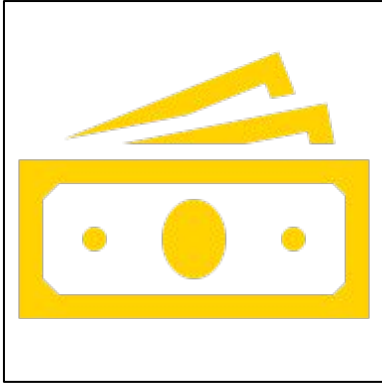
## IV. Operations & Organizational Structure

### Management Team and Governance

- Leadership qualifications and key personnel roles
- Organizational chart and workflow overview
- Staffing projections and timelines for hiring
- Decision-making framework: daily operations vs. strategic policy

# V. Financial Plan & Documentation

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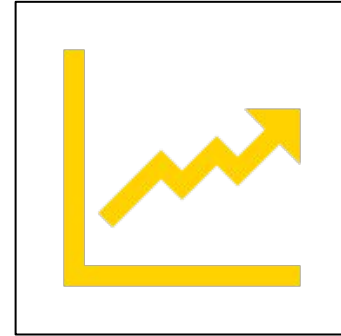
Capital requirements  
& funding sources

- Sources?
  - Debt
  - Equity
  - Personal
- Planned allocation?

# V. Financial Plan & Documentation

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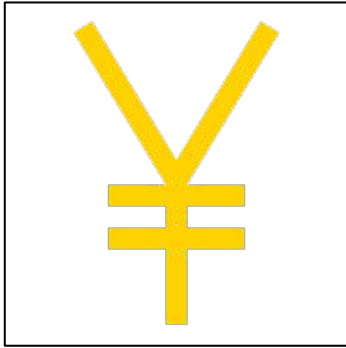
- Balance Sheet
- Income Statement
- Cash Flow



Historical financial statements. 3 Years.

# V. Financial Plan & Documentation

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**Pro forma 3 Year  
projections &**

- Break-even analysis
- Balance Sheet
- Income Statement
- Cash Flow
- Depreciation
- Amortization

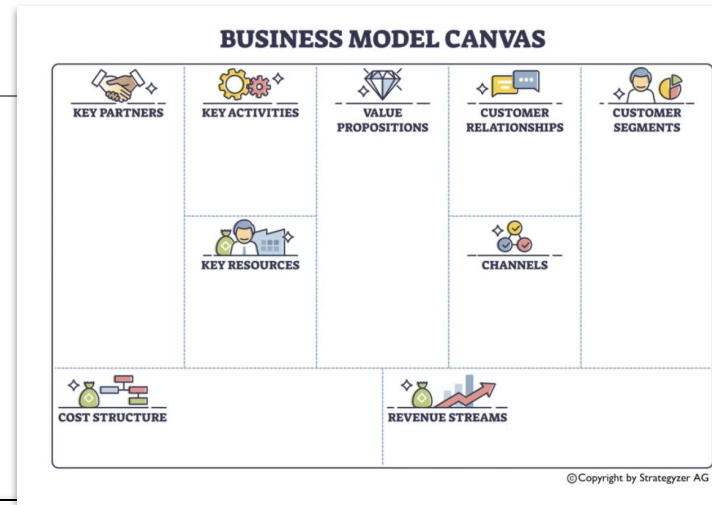
# VI. Appendix

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- Resumes & legal documents (EIN, Incorporation articles, etc...)
- Letters of intent or partnership commitments
- Supporting Financial schedules
- Industry Research, press coverage & supporting material

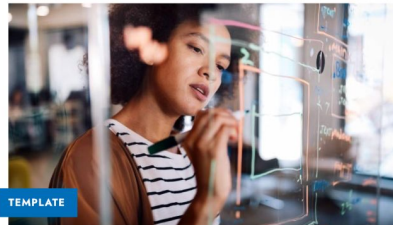
# VI. Simple Planning (non-loan)

- One page Business Model Canvas
- [SCORE.ORG](https://www.score.org) > Templates and Resources



## Business Plan Templates

You can use the templates below as a starting point to create your startup business plan or map out how you will expand your existing business. Then meet with a **SCORE** mentor to get expert business planning advice and feedback on your business plan.



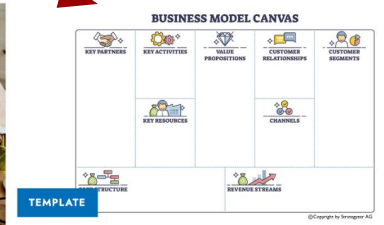
### Business Plan Template for a Startup Business

To increase your odds of a successful business startup, download this step-by-step business plan template you can use to plan for your new business.



### Business Plan Template for an Established Business

Download our free business plan template for your established business as a Word doc. A business plan for an established business serves as a roadmap guiding the growth and continued success of...



### Business Model Canvas Template

If writing a full business plan seems overwhelming, start with a one-page Business Model Canvas. Developed by Founder and CEO of Strategizer, Alexander Osterwalder, it can be used to easily...

# Questions?

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Get help with **YOUR** business plan from one of our 10,000+ mentors at

# SCORE.org