

BUSINESS PLAN

BUSINESS OVERVIEW

PROFILE

Company Name

Business Address

Phone Number

Marketing Tip! Name, address and phone number (known as NAP) heavily influences your local SEO (search engine optimization). Always make sure you enter them consistently. Track all the places you enter your NAP and if you update it in one place, update it everywhere.

Email Address

Website

Date Established

Ownership/Legal Status

Company History

ELEVATOR PITCH

Products and Services

Core Values

Target Demographic

Unique Selling Proposition

Vision

Mission:

Goals and Objectives

PRODUCTS/SERVICES

INDUSTRY PROFILE

Industry

Industry Description

Industry Trends

Local Market

KEY COMPETITORS

Key Competitors

SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats

Strengths

Weaknesses

Opportunities

Threats

Tip! In analyzing your competition, you want to look at what your competitors are doing well, what they don't do well, and how you can improve what they're doing.

MARKETING

MARKETING STRATEGY

Goals and Objectives

Marketing Personas

Purchase Journey

Marketing Channels

Sales Process

Strategic Alliances

BUSINESS OPERATIONS

OPERATIONS

Business Operations

Location(s)

Management Overview

MANAGEMENT & PERSONNEL

Personnel/Staffing

Legal Team

Insurance

Finances

Banking

Marketing

Suppliers

FINANCIAL PLAN

FINANCIAL PROJECTIONS

Sales Forecast

Expenses Budget

Cash Flow

Balance Sheet

Break Even

EXECUTIVE SUMMARY

OUTLINE

You are not in this alone, we are here to help! Call **1-888-597-1083** to get in touch with one of our business banking experts to help grow your business.