

**COVER PAGE**

**Put Business Name Here**

**Business Name:**

**Primary Business Contact Name**:

**Street Address**:

**City, State, Zip**:

**Work Phone**:

**Home Phone**:

**Cell Phone**:

**Fax**:

**Email**:

**Website**:

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# EXECUTIVE SUMMARY

**Written Last:**

**Brieﬂy Describe Your Business** (One paragraph summary):

**Legal Organization** (LLC, Sole Proprietor, S Corporation):

**Ownership** (Enter name(s) of owner(s)):

**Funding Request**:

# BUSINESS DESCRIPTION

**Business Description** (Provide a detailed description of your products, services, organization, operations and management):

**Vision (**What are your long-term aspirations?):

**Mission** (What do you do that helps you meet your vision?):

# GOALS

Ensure that goals are S.M.A.R.T. – Speciﬁc, Measurable, Achievable, Realistic, and Timed

**Short-Term Goals** (less than one year):

**Long-Term Goals** (one year or more):

# SWOT ANALYSIS

**WITHIN THE COMPANY**

**S**trengths:

**W**eaknesses:

**OUTSIDE THE COMPANY**

**O**pportunities:

**T**hreats:

# INDUSTRY CHARACTERISTICS & TRENDS

# CUSTOMER

**Demographics:** Who are your customers? (average age, income, education, etc.)

**Psychographics:** What are your customers’ personalities, values, attitudes, interests, and lifestyles?

**Geographic Area:** What area do you serve?

# COMPETITORS

Provide top 3 competitors with strengths and weaknesses for each competitor, feel free to add more.

1. **Business Name**

Strengths:

Weaknesses:

1. **Business Name**

Strengths:

Weaknesses:

1. **Business Name**

Strengths:

Weaknesses:

# SALES PROJECTION SUPPORTING DATA

**Potential Customer Base**:

**National Trends**:

**Competitive Advantage**:

**Share of existing market to capture**:

# MARKETING PLAN

**Social Media**:

**Customer Loyalty Program**:

**Website**:

**Internet Advertising**:

**Blog**:

**Newsletter**:

**Direct Mail**:

**Radio**:

**Newspaper**:

**Television**:

# SUPPORT PROFESSIONALS

**CPA**:

**Attorney**:

**Bank**:

**Insurance**:

**SBDC Consultant**:

**Other**:

# FINANCIAL PROJECTIONS SUMMARY AND ASSUMPTIONS

See spread sheets