



BUSINESS PLAN OUTLINE

1. **Executive Summary**
 - This section should be written last. 1 to 2 paragraphs in length
 - Overview of business, marketplace, management, assumptions, long-term strategy, loan amount and effect of loan on business (if applicable), estimate of 1st and 2nd year revenue

2. **General Company Description**
 - Who are you? What do you do?
 - Mission statement
 - Company goals and objectives
 - Your business philosophy – what is important to you in business?
 - Your product or service
 - Value proposition (include your meaning)
 - Technology platform, if any

3. **Proposed Location**
 - Proposed location
 - Why proposed location was selected?
 - Advantages/disadvantages of proposed location

4. **Industry and Market Analysis**
 - Industry description and analysis (across the US, your State, your City), trends and strategic opportunities
 - Description/profile of ideal customer
 - Why was this target market selected?
 - Size of market (# of potential customers)
 - Anticipated growth of market
 - Names of your key competitors
 - Strengths and weaknesses of key competitors
 - Your competitive advantage
 - Your anticipated market share

5. **Marketing Strategy**
 - Product/service strategy
 - Pricing strategy
 - Advertising and promotion
 - What is your distribution network? How will your product or service reach your customers?

6. **Production/Operations/Manufacturing**
 - Production facility
 - Production schedule
 - Inventory control
 - Financial control

7. Management

- Description of background and experience of owner and key managers and the roles they will assume in your business
- Professional advisors – your Circle of Influence

8. Personnel

- Description of full-time personnel (number, duties, wages, etc.)
- Types of part-time personnel
- Outside contractors, etc.

9. Long-Term Development and Exit Plans

- Long-term business development goals (1-year, 3-year, 5-year horizons)
- Action Plans
- Timing
- Risk evaluation and management
- Exit Plan

10. Financial Data

- Cash Flow Projections (at least 2 years), including assumptions and notes
- Income Projections (2 years), including assumptions and notes (Profit and Loss)
- Balance Sheet
- Break-even analysis

11. Use of Loan Funds

- Breakdown of how the loan would be used
- Repayment schedule

12. Appendix (optional)

- Resumes of key managers
- Letters of intent/key contracts
- Endorsements/testimonials
- Market research results
- Marketing materials
- Other supporting materials

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