

# SMALL BUSINESS PLAN

## I. BUSINESS INFORMATION

Business Name: \_\_\_\_\_

Principal Office Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

\_\_\_\_\_ Zip Code: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Business Email: \_\_\_\_\_

Website (if applicable): \_\_\_\_\_

Date of Plan Creation: \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

## II. EXECUTIVE SUMMARY

### 2.1 Business Concept

This Business Plan is prepared for a **New Business**.

The primary purpose of the Business is:

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## **2.2 Mission Statement**

The mission of the Business is:

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## **2.3 Vision Statement**

The long-term vision for the Business is:

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## **2.4 Business Goals**

The primary short-term and long-term objectives are:

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## **III. COMPANY OVERVIEW AND LEGAL STRUCTURE**

### 3.1 Legal Entity

The Business is organized as follows (check one):

- ☐ Sole Proprietorship
- ☐ General Partnership
- ☐ Limited Liability Company (LLC)
- ☐ C-Corporation
- ☐ S-Corporation
- ☐ Non-Profit Organization
- ☐ Other: \_\_\_\_\_

### 3.2 State of Formation

The Business is formed and registered under the laws of the State of:

\_\_\_\_\_

### 3.3 Ownership Structure

The owners/shareholders of the Business are:

- |             |                       |
|-------------|-----------------------|
| Name: _____ | Percentage Ownership: |
| _____ %     |                       |
| Name: _____ | Percentage Ownership: |
| _____ %     |                       |
| Name: _____ | Percentage Ownership: |
| _____ %     |                       |
| Name: _____ | Percentage Ownership: |
| _____ %     |                       |

## IV. PRODUCTS AND SERVICES

#### **4.1 Product/Service Description**

The Business provides the following products and/or services:

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#### **4.2 Pricing Strategy**

The pricing strategy for the products/services is:

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#### **4.3 Competitive Advantage**

The Business distinguishes itself from competitors by:

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### **V. MARKET ANALYSIS**

#### **5.1 Target Market**

The primary target audience for the Business includes:

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### **5.2 Industry Outlook**

The current state of the industry and projected growth is:

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### **5.3 Competitor Analysis**

The main competitors in the market are:

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## **VI. MARKETING AND SALES STRATEGY**

### **6.1 Marketing Channels**

The Business will utilize the following marketing channels (check all that apply):

- ☐ Social Media Marketing
- ☐ Search Engine Optimization (SEO)
- ☐ Paid Advertising (PPC/Print)
- ☐ Email Marketing
- ☐ Networking and Referrals
- ☐ Direct Sales
- ☐ Other: \_\_\_\_\_

## **6.2 Sales Strategy**

The strategy for converting leads into customers is:

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## **VII. OPERATIONAL PLAN**

### **7.1 Location and Facilities**

The Business will operate from:

- ☐ Home-based office
- ☐ Leased commercial space
- ☐ Owned commercial property
- ☐ Virtual/Remote only

### **7.2 Equipment and Technology**

The following equipment and technology are required to start operations:

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### **7.3 Suppliers and Vendors**

Key suppliers and vendors for the Business include:

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## **VIII. FINANCIAL PLAN**

### **8.1 Startup Capital Requirements**

The total estimated capital required to launch the Business is: \$

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### **8.2 Funding Sources**

The capital will be sourced from (check all that apply):

- ☐ Personal Savings
- ☐ Bank Loans
- ☐ Angel Investors/Venture Capital
- ☐ Friends and Family

☐ Small Business Administration (SBA) Loan

☐ Other: \_\_\_\_\_

### **8.3 Projected Revenue**

The projected revenue for the first year of operations is: \$

\_\_\_\_\_

### **8.4 Break-Even Analysis**

The Business expects to reach the break-even point by:

\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

## **IX. LEGAL AND REGULATORY COMPLIANCE**

### **9.1 Licenses and Permits**

The Business requires the following licenses and permits to operate legally:

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### **9.2 Insurance**

The Business will maintain the following insurance coverage (check all that apply):

☐ General Liability

☐ Professional Liability (E&O)

☐ Workers' Compensation

☐ Commercial Property



☐ Product Liability

☐ Cyber Liability

## **X. GENERAL PROVISIONS**

### **10.1 Confidentiality**

The contents of this Business Plan are confidential and proprietary. Any recipient of this plan agrees not to disclose, copy, or distribute any information contained herein without the express written consent of the Business Owner(s).

### **10.2 Forward-Looking Statements**

This Business Plan contains forward-looking statements regarding future operations and financial performance. These statements are based on current expectations and projections about future events and are subject to risks, uncertainties, and assumptions. Actual results may differ materially from those expressed in the forward-looking statements.

### **10.3 Governing Law**

This Business Plan and the operations described herein shall be governed by and construed in accordance with the laws of the State of \_\_\_\_\_ .

### **10.4 Severability**

If any provision of this document is held to be illegal, invalid, or unenforceable, such provision shall be fully severable, and the remaining provisions shall remain in full force and effect.

### **10.5 Entire Agreement**

This document constitutes the entire plan and understanding of the Business regarding the subject matter herein and supersedes all prior discussions, agreements, or understandings.

## **XI. ADOPTION AND EXECUTION**

By signing below, the undersigned Owner(s) formally adopt this Small Business Plan as the guiding document for the Business operations effective as of the date first written above.

**Business Owner 1**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

**Business Owner 2 (if applicable)**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

**XII. NOTARY ACKNOWLEDGMENT**

State of \_\_\_\_\_

County of \_\_\_\_\_

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, the undersigned Notary Public, personally appeared \_\_\_\_\_ (Name of Signer(s)), known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Print Name: \_\_\_\_\_

(Seal)

My Commission Expires: \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_