

BUILD YOUR BUSINESS PLAN



WORKING TEMPLATE

Your business plan is a vital document that records the purpose of your operation, what you hope to achieve and how you plan to do it. It acts as an accountability tool for the organization by creating a roadmap of goals and steps of action. Most importantly, this planning tool is critical to attracting funding or applying for financing.

This working template is intended to help you develop your very own business plan by outlining sections that you may want to include. Once completed, use this working document to create your formalized business plan.

Executive Summary

Tip: It is easier to write this statement last, once you've had an opportunity to work through your goals, objectives, assets and capabilities.

Overview of Objectives

Tip: Include in this section a short overview of your company, the product(s) you will offer, who your target customers are and your plans for distributing.

Overview:

Product:

Customers:

Distribution:

Define Your Product(s) or Service Line

Tip: Supply specific details about your business operation as well as your go-to-market strategy, including a list of products or services you are currently prepared to offer and product pricing.

Market Analysis

Tip: This section of your plan will contain your market summary. Plan to write a paragraph or two describing your targeted market segment, with details such as location, size, and market expectations. The next step in completing this section is to identify the market trends that favor your business opportunity. Last, discuss your business requirements. This section will explore what your business will need in order to compete in the market defined above.

Define Your Sales and Marketing Strategy

Tip: The purpose of this section is to explain your brand positioning, the goals you aim to achieve and channels of distribution, as well as how you will measure success.

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Define Your Operations Plan

Tip: An operations plan explains how you will handle the day-to-day running of your business, including details such as staffing, manufacturing, fulfillment and inventory.

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Explain Your Financials

Tip: This critical evaluation will help you determine whether your opportunity is viable and will be used by investors and lenders as you seek funding for operational or startup costs.

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