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**GENERAL BUSINESS INFORMATION**

***Primary Ownership & Status***

Enter text here

***Experience***

Enter text here

***Company Name***

Enter text here

***Why Are You Interested In This Business?***

Enter text here

***How Did You Come Up With The Idea?***

Enter text here

***Industry Description***

Enter text here

***Monthly Revenue “Today”***

Enter text here

***Products & Services***

Enter text here

***Target Revenue In 24 Months***

Enter text here

***Current Business Status***

Enter text here

***What Will The Largest Revenue Generator Be For Your Business?***

Enter text here

***What Part of Your Business Is Not Easily Found In Other Businesses?***

Enter text here

***What Part of Your Business Cannot Be Replaced By A Competitor?***

Enter text here

***What Part Of Your Business Cannot Be Duplicated Without Significant Investment?***

Enter text here

**BUSINESS & FINANCIAL OBJECTIVES**

***Startup/Investment & Other Capital Requirements***

Enter text here

***Projected Rate Of Return On Investment***

Enter text here

***Estimated Operating Costs & Payroll***

Enter text here

***Estimated Breakeven & Profitability Points***

Enter text here

**BUSINESS SYSTEMS**

***Order Management & Processing Systems***

Enter text here

***Accounting System***

Enter text here

***Purchasing System***

Enter text here

***Payroll System***

Enter text here

***Project Management & Production Systems***

Enter text here

***Product/Service Delivery & Quality Control***

Enter text here

***Client Acquisition & Maintenance***

Enter text here

***System Evolution***

Enter text here

**OPERATING COSTS & ORGANIZATIONAL STRUCTURE**

***Principles: Management Expertise & Relevance to the Business***

Enter text here

***In-House Services VS Outsourced***

Enter text here

***Responsibility Matrix***

Enter text here

***Access to Labor Over Ramp-Up Period***

Enter text here

***Office/Operating Space Requirement & Plan***

Enter text here

***Patents, Insurance, Legal Requirements/Permits & Licenses***

Enter text here

***Payment Expectations for Ownership: Salary/Owners Draw***

Enter text here

***How Will Your Operating Costs & Organizational Structure Change Over the Next 24 Months?***

Enter text here

**BUSINESS RAMP-UP**

***Geographical Range at Startup***

Enter text here

***Startup Targets & Timing***

**Action Start Date Completion Date**

Enter text here

Enter text here

Enter text here

Enter text here

Enter text here

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Enter text here

Enter text here

***Products/Services at Startup***

Enter text here

***Product/Service Targets & Timing***

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Year 1** |  **Year 2** |  **Year 3** |

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Enter text here

***Investment Requirements for Market Growth***

Enter text here

***Investment Requirements for Product/Service Growth***

Enter text here

***Decision Metrics for Expansion Plans***

Enter text here

***What Scale-Up Are You Planning in 2-3 Years?***

Enter text here

**BUSINESS METRICS**

***Top Three Metrics Used to Manage the Business***

Enter text here

Enter text here

Enter text here

***Targets for Each Metric***

Enter text here

Enter text here

Enter text here

***Person Responsible for Leading & Driving Each Metric***

Enter text here

Enter text here

Enter text here

***Criteria Customers Will Judge the Business On?***

Enter text here

***How Will Customer Expectations & Feedback Be Tracked?***

Enter text here

***What Reporting Structure Will You Use to Track Metrics/Feedback?***

Enter text here

**MARKETING PLAN**

***Market Definition***

Enter text here

***Size of the Market for Your Products and Services Today***

Enter text here

***Size of the Market for Your Products and Services in Two Years***

Enter text here

***Projected Market Share Each Year for Three Years***

Enter text here

***Main Competitors & Their Market Share***

Enter text here

***Key Strengths and Weaknesses of Competitors***

Enter text here

***Differentiating Factors Versus the Competition***

Enter text here

***Future Trends Happening in the Market***

Enter text here

***Pricing Structure***

Enter text here

***Product Cost, Also Known as Cost of Goods Sold (COGS)***

Enter text here

***Distribution Channels***

Enter text here

***Social Media Strategy***

Enter text here

***Promotional Strategy***

Enter text here

***Market Accessibility***

Enter text here

***Business Development Plan***

Enter text here

**STARTUP RESOURCES**

***Monthly Income Requirement to Support Current Lifestyle***

Enter text here

***Other Sources of Income During Startup***

Enter text here

***Savings to Support Yourself During Ramp Up***

Enter text here

***Other Investors/Partners in the Future***

Enter text here

***Loans to Support the Startup Period***

Enter text here

***Owner Investment in the Business***

Enter text here

***Financial Objective***

Enter text here

***Backup Plan***

Enter text here

**ADMINISTRATIVE RESOURCES**

***Registered Business Name & Tax ID***

Enter text here

***Registered Patents/Trademarks/Permits***

Enter text here

***Loans***

Enter text here

***Legal Fees***

Enter text here

***Accounting Fees***

Enter text here

***Healthcare Costs***

Enter text here

***Insurance Costs (other than healthcare)***

Enter text here

***Rent & Utility Costs***

Enter text here

***Marketing & Promotional Costs***

Enter text here

***Other Requirements***

Enter text here

**EMPLOYMENT PLAN**

***Number of Employees***

Enter text here

***Job Titles & Descriptions***

Enter text here

***Wages***

Enter text here

***Benefits***

Enter text here

***Other Requirements***

Enter text here

**FUTURE EXPANSION PLANS**

***Plans for Expanding the Current Business Model***

Enter text here

***Investment Required to Achieve Future Expansion***

Enter text here

***Business Milestones Required Before Expansion***

Enter text here

***Expansion Within the Current Business Plan***

Enter text here

***Business Sustainability***

Enter text here

**“GUT” CHECK**

***Have You Ever Conducted a Market Test for Your Business?***

Enter text here

***Has Anyone Tried Your Business Idea & Failed?***

Enter text here

***How is Your Business Plan Different and/or Better Than Similar Businesses?***

Enter text here

***When You Launch Your Business: What Will You Do In Your First Month?***

Enter text here

***When You Launch Your Business: What Will You Do Months Two Through Six?***

Enter text here

***When You Launch Your Business: What Will You Do Months Six Through Twelve?***

Enter text here

***Where Do You Need Help?***

Enter text here

***What is Your Biggest Fear or Question Moving Forward?***

Enter text here

**INVESTMENT BREAKDOWN**

***What Assets Do You Need to Purchase to Get Your Business Started?***

Enter text here

***What Operating Expenses Will You Need to Pay Out-of-Pocket Until the Business Can Support Them on Its Own?***

Enter text here

***What Other Startup Expenses Will You Need to Fund?***

Enter text here

***Chart Your Investment Plan***

Enter text here

**Financials Yr1**

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**Financials Yr2**

Enter text here

**Financials Yr3**

Enter text here

**EXECUTIVE SUMMARY**

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**EXECUTIVE SUMMARY**

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**NOTES**

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**SMALL BUSINESS PLANNING MADE SIMPLE**

**Small Business Planning Made Simple: What To Consider Before You Invest**



Small Business Planning Made Simple - Guides you through the step-by-step process of writing a successful business plan.

- Provides some great tips that you can use to improve the effectiveness of your plan.

- Includes a blank template for taking notes right here in the book so that you can start building the framework of your business as you go.

 *- Includes examples of organizational charts, sales plans, income statements, investment plans, market share estimates and much more.*

- By the time you get done reading and writing in this book, you will be prepared to construct an honest and productive plan for your small business to implement.

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