Your company name

CoNTACT: YOUR NAME

EMAIL ADDRESS

WEBSITE URL

PHONE

Business Plan

[Year]

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**Executive Summary**

*This is a summary of the company and its goals. It’s a snapshot of what your company is all about and why you’re looking for funding.  Usually it is the last part written and summarizes what is covered in the rest of the plan.*

*Since this is the first thing your prospective investor will read about your company, it is essential that it grabs their attention.  DA Copywriter can help you to come up with an intelligent, intriguing Executive Summary that will capture investors' attention.*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

**Company Profile**

*This section gives a little more detail about your company. It’s divided into three parts: Company Overview, Company History and Management. The first two are can sometimes be combined together.*

*Company Overview*

*This is a short summary about the company, covering what you’re selling, why you’re selling it, and what your company is all about. This is a great place to define what your company’s* [*USP (Unique Selling Proposition)*](http://dacopywriter.com/what-is-usp-unique-selling-propositionlishing-unique-selling-proposition/) *is.*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Company History*

*Here you give a short description of how your company came into existence.*

*-- What was the inspiration?*

*-- How did you get the idea?*

*-- What steps have you already taken?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Management*

*This gets into the who’s who of the company. It can be as general or as detailed as you want it in terms of who is covered. You want to make sure that you talk about the important players in your company and how they are going to contribute. Some things you might want to include would be:*

*-- Past work experience*

*-- How their/your past work experience relates to your company*

*-- What is their role in your company?*

*-- What special skills or expertise do they possess that will benefit your company?*

*-- What do they bring to the table (personally and professionally)?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

**Product Description**

*Now, the moment you’ve been waiting for! Tell your audience about your product or service.*

*Product Offerings*

*In this section, you cover the description f your product or service, how it works, what makes it special, etc.*

*Some questions you might want to ask yourself:*

*-- Why is your product so important?*

*-- What is the demand that you’ve observed, and how does your product or service fulfill that need?*

*-- Why are you confident that your product or service will be purchased or used?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Competition*

*This is an important section because it shows your investor that you don’t have your head in the sand and are aware of what’s going on around you. Even if you think there is no one out there doing what you’re doing, that’s no reason for skipping this section – find your closest competitor and talk about them. It shows that you are aware of your competition and understand how to make your product or service marketable right alongside them.*

*-- Who are your competitors?*

*-- Are they successful?*

*-- How is their product similar to your product or service?*

*-- Are your competitors missing the boat on a key aspect? Does your product fulfill this missing element?*

*-- What is it about your product or service that stands out among your competitors? Why is this important?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*It is important that this section comes across clearly and convincingly.  DA Copywriter can help you do exactly that.* [*Contact*](http://dacopywriter.com/contact/) *me by email* [*deborah@dacopywriter.com*](mailto:%20deborah@dacopywriter.com) *or phone (510-734-3040) for a quote!*

**Target Market**

*In this section you define the market that your product or service will be targeting. This is very important to understand. Marketing to the wrong audience can cost you – so it’s essential that you know your customer.*

*Target Market Overview*

*Here you get to the specifics of your audience. Research is key for backing up claims with facts and figures.*

*-- What is the market for your product?*

*-- How large is this market?*

*-- Are there similar markets?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Consumer Profile*

*In this section, you’ll talk about your target customer. Imagine your typical customer in your mind. Then give a detailed description about him/her. The better you know your audience, the more likely you will succeed -- and investors see this.*

*-- What sort of spending do they do on this sort of product or similar products per year?*

*-- Is there a geographic tendency (i.e. targeting only Bay Area residents)?*

*-- Does the product/service appeal to a certain age group? Hobby or interest group? Income bracket?*

*-- Are they technology savvy? What is the medium they communicate in most? (i.e. email, Facebook, Instagram, SnapChat, text, phone.)*

*-- Why would this person want your product over the other similar products on the market?*

*Identifying your target market shows investors that you have a handle on what you're doing.  DA Copywriter can help you come up with a solid Target Market as well as the research to back up your claims of a demand for your product.* [*Contact*](http://dacopywriter.com/contact/) *me by email* [*deborah@dacopywriter.com*](mailto:%20deborah@dacopywriter.com) *or phone (510-734-3040) for a quote!*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

**Strategy and Implementation**

*This is divided up into several sections that focus on how you’re going to get your product from conception onto the market.*

*Marketing Overview*

*This can be a little repetitious. It’s a summary of the strategy and who you’re targeting for your product. This way, the investor can read the next sections in context and see how that fits with your target group. In shorter business plans, I recommend leaving this out.*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Positioning*

*This is your product or service’s position in the marketplace. It’s been covered a bit in other sections, but this is the place where you can really go into detail about it.*

*-- What is your company's position in the marketplace?*

*-- How does your product or service stand out from the masses?*

*-- What is unique about your product?*

*-- Why would consumers choose your product over another competitor’s?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Promotional Strategy*

*This is where you’ll talk about your marketing strategy for selling your product or service.*

*-- How are you planning to get the word out about your product/service?  (Give specifics) Why did you choose these methods of promotion?*

*-- What is your plan to initiate and continue sales?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Pricing*

*This gives the price you plan to charge for your product or service.  Some things to consider:*

*-- What is the price of your product or service?*

*-- How did you come up with this calculation?*

*-- What do your competitors charge?*

*-- What does your customer get for this price?*

*-- Are there any coupons, discounts, or trial offers to introduce your product or service?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*Distribution*

*In this segment, you will talk about your plan for how your customer can access or purchase your product or services.*

*-- Is there a website?*

*-- Will you be selling direct to the customer or through a third party? If the latter, how did you choose the third party you plan to use?*

*-- How can a customer contact you for sales or problems?*

***[To use this template simply delete the instructions above and it’s ready for you to fill in]***

*The Strategy and Implementation section has a lot of interlocking pieces that can be complicated.  I can help you understand and navigate your way through this.* [*Contact*](http://dacopywriter.com/contact/) *me by email* [*deborah@dacopywriter.com*](mailto:%20deborah@dacopywriter.com) *or phone (510-734-3040).*

**Milestones**

*Now you’ll give investors the picture of where you are in terms of getting your business up and running as well as where you need to go.  This is usually done in a timeline format. A fillable one has been provided for you below.*

*-- What are some past events that helped to shape the company to this point?*

*-- What are you working on now?*

*-- What deadlines do you have?  How close are you to achieving those deadlines?*

*-- What are your future goals?*

**Where [name of business] is now**

[date]: Event

[date]: Event

[date]: Event

[date]: Event

**Next Steps**

[deadline date]: Event

[deadline date]: Event

[deadline date]: Event

**Future Goals**

[anticipated date]: Event

[anticipated date]: Event

[anticipated date]: Event

**Financial Plan**

*These are the hard numbers.  Since this changes so often, some business owners have elected to keep this as a separate document so changes can be made readily.  Your Financial Plan will show a detailed summary of costs, projected revenue, and potential ROI (Return On Investment).  It can be as detailed or as simple as you like. Below is a very simplified chart you can use for the Financial Plan.*

*For more detailed financials, I can put you in touch with an excellent accountant.*

*Projected Costs*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Launch | FY#1 | FY#2 | FY#3 |
| Employee Salaries |  |  |  |  |
| Consultant/Outsourcing |  |  |  |  |
| Website development/maintenance |  |  |  |  |
| Hosting | $0 | $0 | $0 | $0 |
| Advertising | $0 | $0 | $0 | $0 |
| Customer Service/Operators | $0 | $0 | $0 | $0 |
| Insurance | $0 | $0 | $0 | $0 |
| Administrative Expenses | $0 | $0 | $0 | $0 |
| Telephone, Electricity, Postage | $0 | $0 | $0 | $0 |
| Rent, rates, taxes | $0 | $0 | $0 | $0 |
| Stationary/Printing | $0 | $0 | $0 | $0 |
| Travel | $0 | $0 | $0 | $0 |
| Consultancy, Audit, Legal | $0 | $0 | $0 | $0 |
| Other | $0 | $0 | $0 | $0 |
| Miscellaneous | $0 | $0 | $0 | $0 |
|  |  |  |  |  |
|  |  |  |  |  |
| **Total expenses** | **$0** | **$0** | **$0** | **$0** |
|  |  |  |  |  |

## \*Please note that all numbers in the tables and charts are estimates only.

*Summary of Costs*

*Include a short paragraph that gives some explanation of the costs you’ve listed in the chart above. You can also choose to summarize everything in the charts at the end of the Financial Plan.*

*Income and Sales Forecast*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | FY  Launch | FY#1 | FY#2 | FY#3 |
| Projected Sales | $0 | $0 | $0 | $0 |
| Total Expenses | $0 | $0 | $0 | $0 |
| Net Profit | **$0** | **$0** | **$0** | **$0** |

*Financial Plan Summary*

*It is useful to give the formula for how you came up with the projected sales and what sort of expectations you have as your product or service gains momentum in sales.*

Let DA Copywriter help you create a convincing business plan that attracts investors. Call (510)734-3040 or email [deborah@dacopywriter.com](mailto:deborah@dacopywriter.com) to get started.