<Company Name> <Year> Business Plan

Table of Contents

[Executive Summary 2](#_Toc465692165)

[Regional Description: 2](#_Toc465692166)

[Regional Financial & Strategic Objectives: 2](#_Toc465692167)

[Keys to Success: 3](#_Toc465692168)

[Market Analysis 3](#_Toc465692169)

[Market Demographics: 3](#_Toc465692170)

[Main Competitors: 3](#_Toc465692171)

[Market Needs: 4](#_Toc465692172)

[Market Growth: 4](#_Toc465692173)

[Marketing Efforts: 5](#_Toc465692174)

[Products/Services 5](#_Toc465692175)

[Our Positioning: 5](#_Toc465692176)

[Competitive Comparison: 5](#_Toc465692177)

[Strategy and Implementation 6](#_Toc465692178)

[SWOT Analysis: 6](#_Toc465692179)

[Strengths: 6](#_Toc465692180)

[Weaknesses: 6](#_Toc465692181)

[Opportunities: 6](#_Toc465692182)

[Threats: 6](#_Toc465692183)

[Competitive Advantage: 7](#_Toc465692184)

[Market Trends and Assumptions: 7](#_Toc465692185)

[Key Customers: 8](#_Toc465692186)

[Projects: 8](#_Toc465692187)

[Key Performance Indicators 8](#_Toc465692188)

[Milestones: 9](#_Toc465692189)

[Tasks/Activities: 9](#_Toc465692190)

[Roles & Responsibilities: 10](#_Toc465692191)

# Executive Summary

## Description:

*(Use this section to briefly describe the company, the industry it operates in and what the main products and services it offers)*

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## Financial & Strategic Objectives:

*(Use this section to list the overarching strategic and financial objectives. This helps keep our tasks aligned with our overall goals.)*

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## Keys to Success:

*(List the high level goals/objectives that need to be hit to be deemed successful. This is NOT the listing of specific KPIs but rather items like: (a) increased revenue growth (b) decreased expenses (c) improved customer satisfaction)*

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# Market Analysis

## Market Demographics:

*(List the areas this business plan covers (e.g. specific states, all of United State, select countries, truly international).*

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## Main Competitors:

*(List the known competitors within each area you will be selling in. This is NOT where you put any competitive analysis)*

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## Market Needs:

*(Document what the customer base needs as compared to what you are able to offer. This will create initiatives, projects for how to fill those needs. Some "need" categories for segmentation include: Improved service delivery, increased cash flow, diversification of product offerings, etc.)*

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## Market Growth:

*(What is the projected growth for each market you are targeting? Is this an emerging market, a mature market or declining market?)*

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## Marketing Efforts:

*(Document the activities that are used to promote your products and services.)*

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# Products/Services

## Our Positioning:

*(What products and/or services are we providing to fulfill the marketing needs?)*

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## Competitive Comparison:

*(Taking the list of competitors listed above, create a comparison chart of products/services offered in the area – see example below)*

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| --- | --- | --- | --- | --- |
| **Product/Service** | **<Your Company>** | **Competitor A** | **Competitor B** | **Competitor C** |
| Product A |  |  |  |  |
| Product B |  |  |  |  |
| Product C |  |  |  |  |
| Service A |  |  |  |  |
| Service B |  |  |  |  |

**Legend:** Green = Currently Offering / Yellow = Planning to Offer this year / White = Won’t Have/Offer

Strategy and Implementation

## SWOT Analysis:

*(For the grid below, put the high level, summary SWOT bullets for the region. In the titled areas below the grid, spend more time detailing out the specific SWOT items)*

### Strengths:

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### Weaknesses:

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### Opportunities:

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### Threats:

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## Competitive Advantage/Value Proposition:

*(List the attributes that allow your company to outperform competitors. Why would a customer choose you over someone else? This information can come from the companies, Mission, Vision, Values and/or Marketing. Remember: L.A.C.E.S.).*

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## Market Trends and Assumptions:

*(List the trends that you are seeing in your region and use forward thinking to make assumptions around how the future will be shaped. Determine the impacts these assumptions would have on your business plan if they were realized.)*

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## Key Customers:

*(This is about creating a customer “profile” or target market that you expect to sell into. What does the perfect customer look like?)*

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### Projects:

*(Projects can relate to People, Process, or Tools and will enable you to effectively manage and monitor your plan progress. A project will have a distinct scope including a start date, end date and key deliverables that should be assigned owners to drive accountability. Use the one-page project charter template to flesh out project specifics)*

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### Key Performance Indicators

*(What criteria/metrics are needed to measure performance – letting you know you’re on the right path to success? Remember they should be “meaningful” so focus on the “intent” of the outcomes; write the KPIs using the S.M.A.R.T. approach.)*

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### Milestones:

*(List the key project milestones/dates that mark the planned completion of a significant event and/or completion of a deliverable. You can track baseline dates to actuals here.)*

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### Tasks/Activities:

*(These include the actionable items that must be completed in order to make the project successful. Make sure it covers Who is doing What by When.)*

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### Roles & Responsibilities:

*(List the individuals/groups that are needed to make the Activities/Project listed above be successful. The use of a RACI matrix could be beneficial here.)*

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