

1. PART 1: Business Identity, Mission and Vision

- 1.1. **Name Selection and Legal Standing:** Choose a name for your business. Detail any differences in your operating names including fictitious names or separate operating names.
- 1.2. **Business Description:** Describe the product or service you are providing to your customer and why you are in business to do so.
- 1.3. **Selection of Business Ownership:** Select the filing type for your business, Sole Proprietorship, C-Corporation, S-Corporation, Single-File LLC, Partnership LLC, Non-Profit and describe why this option best suits your business.
- 1.4. **Business Locality and Strategy:** Select a city and state in which to open your business and detail why this location best suits your business as well as any potential risks.
- 1.5. **Vision and Mission Statements:** Detail a focused Vision Statement that describes why your business is setting up operation and a detail a focused Mission Statement that says how you are going to accomplish that now, today.

2. PART TWO: Competitive Market Analysis

- 2.1. **Market Overview:** Generally, describe the market which your business will enter and any related products of reference.
 - 2.1.1. **Competition and Assessments:** Describe the history of your product or service in the current market, i.e. competing companies, products or ventures currently being funded.
 - 2.1.2. **Company Strengths:** Describe what makes your product or service the better option to the customer and how it will improve the chances of customers choosing your product or service first.
 - 2.1.3. **Challenge Management:** Detail any foreseeable challenges that the market presents to your company, your plan to overcome it, and how you plan on preparing for future challenges.
 - 2.1.4. **Challenge Responses:** After identifying the top three risks for your market entry, detail a contingency plan for each and how you will execute those changes to your business model.
- 2.2. **Industry Profile**
 - 2.2.1. **Industry Specifics and Codes:** Describe your industry, market trends, and any specific details necessary for filing status in your industry. (i.e., NAICS Code, SIC Code, TRI, EPCRA, PPA, CFR, Executive Orders)
 - 2.2.2. **SWOT and Opportunity-Special:** Thinking outside of your company's challenge planning what items can significantly threaten your business. (i.e. weather, political instability, natural disaster...)

3. PART THREE: Management Team and Strategy

- 3.1. **Management Core:** Describe the structure of your business as it relates to your managing officers and the roles your company expects to fill upon inception.
 - 3.1.1. **Corporate Tree:** Create an organized corporate tree to describe your team, growth patterns, and promotion opportunities.
 - 3.2. **Identity Goals:** Describe a project timeline to achieve your business goals. Detail three specific milestones to achieve in the first year, and provide a plan for growth goals by the end of three years and five years.
 - 3.3. **Ethics and Human Resources:** Detail potential ethical issues that may challenge your organization. Consider items like socio-political climate in your industry, trends in spending and debt reconciliation. Consider your business model itself and potential points of exploitation made available by its structure, ensuring a “Code of Ethics” is created to provide response to potential exploitations.
 - 3.4. **Socio-Corporate Responsibility:** It is imperative that your business sow some of its roots in a socio-culturally forward philosophy. Describe how your company’s philosophy will positively impact your community, employees and shareholders. Consider items to offset any social costs of your operations.
4. **PART 4: The Marketing Plan**
- 4.1. **Market Indicators and Sectors:** Describe your market strategy including your penetration points, profiles of your customer market segments including age, education level, socio-economic status, ethnicity, nationality, etc. Provide details about the market share between your target customers and how it relates to the industry.
 - 4.2. **Business Product/Service Model:** Describe your product or service in the greatest detail you can. Its strengths, differentiating factors from the industry, and cost-effective facts.
 - 4.3. **Product/Service Pricing Strategy:** Describe the pricing, cost-levels, profit margins of your product/service. Describe any differing packages, upgrades or discounts offered.
 - 4.4. **Sales and Promotional Strategy:** Describe your sales and promotion strategy, i.e. Pull Strategy, Push Strategy, Impact Strategy, Franchise Holding, Dissonance, First Move...)
 - 4.5. **Direct and Indirect Advertising:** Describe your advertising strategy and how it is the most affecting for your business in its industry as well as the medium best suited for your products/service.
 - 4.6. **Opportunity Planning:** Describe other methods of promotion will you employ to tackle market opportunities and minimize exposure to market weaknesses.
 - 4.7. **Product/Service Distribution Channels:** Detail where and how your product/service be sold, how will it be inspected and maintained in these location and what measures will be used to ensure quality between production and end consumer when considering your distribution channel.

5. PART 5: The Financial Analysis

- 5.1. **Revenue Planning:** Detail your first-year profit expectations (how many products will you sell, what is your profit on that volume). Project your growth for the first three-five years of your operations.
- 5.2. **Operation Cost Planning:** Prepare a statement of expected costs for the first three years for your business including start-up, overhead, deadweight loss a(n) loans or investors capital.
- 5.3. **Start-Up Cost Planning:** Create a Start-Up Expenses estimate and how you plan on securing the funds to start your business. These costs should be estimated over one year.
- 5.4. **Financing and Capital Planning:** Detail how you will secure funding for your startup and ongoing operations including angel investment, IPO and Stock Issuance, etc.
- 5.5. **Income and Balance Sheet Planned:** Create a goal-oriented Income Statement and Balance Sheet assuming full operations.
 - 5.5.1. [Sample Balance Sheet](#)
 - 5.5.2. [Sample Income Statement](#)
 - 5.5.3. [Sample Cash Flows Statement](#)

6. PART 6: Executive Summary and Formatting

- 6.1. **Personalized Coversheet:** Create a personalized cover for your investors, banks and other parties with whom you will discuss this document. Be sure to include a non-disclosure agreement if one is not already in place.
- 6.2. **Table of Contents:** Create a cohesive outline to make the view and review of your material easy.
- 6.3. **Executive Summary:** Outline again why you are starting this business and what new, and unique feature you are bringing to the market and how will it change the industry going forward. Further make remarks respective to shareholders, partners or other affiliates that need to be mentioned as to their role in the organization.