

### **Sample Summary Business Plan Outline**

This section outlines topics that should be addressed within the 25-page-or-less summary business plan. Bulleted sub-topics provide additional guidance regarding areas that may be included as deemed appropriate by the author(s) of the strategic business plan. This outline is generic, and should be customized for your business, industry, and the space allotted. For guidance purposes only, representative page length information has been included adjacent [ ] to each topic area.

**EXECUTIVE SUMMARY** - brief introduction to the business plan [1-2 pgs]

- Mission Statement
- Objectives, Expected Accomplishments (top-level)
- Highlights of Business Plan (“bottom line”)

**BUSINESS OVERVIEW** - overview of the company presenting the business plan [1 pg]

- History of the Business
- Description of the Business
- Legal Form (sole proprietorship, corporation, etc.)
- Location and Facilities

**BUSINESS GOALS** - brief discussion of the short and long term goals of the company [1 pg]

- One Year/Near-Term Goals (specific goals including gross sales, profit margins, market share, expansion plans, new product development, etc.)
- Longer-Term Goals (Return on Investment, net worth, etc.)

**INDUSTRY ANALYSIS** - assessment of the industry in general (without specific regard to the company itself other than its competitive role in the industry) [5-6 pgs]

- Market Need for the Business
- Industry Size (current and future projections in unit and dollar measures)
- Industry Outlook and Growth Potential (trends, new product developments, etc.)
- Customer Analysis (types, requirements, power, etc.)
- Competition Analysis (market share, strengths and weaknesses, profitability, quality, marketing strategy, pricing, etc.)
- Degree of Competitive Rivalry
- Integration Analysis (forward, backward, partial)
- Distribution Patterns
- Mobility Barriers (economies of scale, product differentiation, capital requirements, cost disadvantages independent of size, access to distribution channels, government policy, etc.)
- Supplier Relationships
- Availability of Substitute Materials/Products/Technology

- Critical Success Factors

**MARKETING ANALYSIS** - strategic summary of the company's marketing plan [3-4 pgs]

- Objectives and Strategy
- Pricing Strategy
- Product Positioning Strategy
- Promotion Strategy
- Distribution Strategy

**SALES FORECAST** - current and future sales projections [1-2 pgs]

- Annual Forecast for 5 year Horizon (units and dollars)
- Product Line Profitability Analysis (sensitivity analysis of product line costs, expense element relationships, trend analysis)
- Assumptions and Sources for Forecasts

**MANUFACTURING ANALYSIS** - strategic summary of the company's manufacturing operations and related issues [2-3 pgs]

- Description of Process (brief)
- Physical Facilities Requirements
- Minimum Efficient Scale Facilities
- Machinery and Equipment Requirements
- Raw Materials Requirements (availability, quality, sources, etc.)
- Inventory Requirements (method of control, turnover rates, levels, etc.)
- Personnel Required (full/part-time, skill level, availability, training level, etc.)

**MANAGEMENT ANALYSIS** - strategic summary of the company's management and related issues [1-2 pgs]

- Organizational Structure
- Organizational Chart with Reporting Relationships
- Duties and Responsibilities of Key Personnel
- Management Team with Background of Key Management Personnel

**FINANCIAL ANALYSIS** - strategic summary of the company's financial position [2-3 pgs]

- Balance Sheets (prior two years as published, annual for next three years)
- Income Statements (prior two years as published, annual for next three years)
- Comparative Ratio Analysis (based on identified industry SIC code)

**STRATEGIC PLAN** - overall strategy the company intends to pursue [1-2 pgs]

- Action Plan for Achieving Short and Long Term Goals
- Method and Schedule for Measuring Progress
- Relevant Policies

APPENDICES - Exhibits, charts, graphs, spreadsheets, etc. detailing information presented in the body of the strategic business plan

- Annual Reports
- Duties and Responsibilities of Key Positions
- Price Lists
- Promotional Materials, Media, Articles, Etc.