



BUSINESS PLAN TEMPLATE

Business Information

Business Name: _____

Owner(s): _____

Business Address: _____

Phone: _____

Email: _____

Website: _____

Date Prepared: _____

Executive Summary

Business Overview

Briefly describe your business and what it does.

Mission Statement

What is the purpose of your business?

Products or Services

What products or services do you provide?

Funding Request (If Applicable)

How much funding are you seeking and how will it be used?

Business Goals

1-Year Goal:

3-Year Goal:

5-Year Goal:

Company Description

Business Structure

- ☐ Sole Proprietorship
- ☐ Partnership
- ☐ Limited Liability Company (LLC)
- ☐ Corporation
- ☐ Other: _____

Business History

Describe how and why the business was started.

Business Location

Describe your location and why it was selected.

Competitive Advantage

What makes your business unique?

Vision Statement

What do you want your business to become?

Products and Services

Describe Your Products and/or Services

Customer Benefits

What problem does your business solve?

Pricing Strategy

How are your products or services priced?

Future Growth Opportunities

Market Analysis

Industry Overview

Describe your industry and current market trends.

Target Customer

Age Range: _____

Location: _____

Income Level: _____

Interests or Needs: _____

Market Need

Why will customers choose your business?

Competitor Analysis

Identify Your Competitors

Think about other businesses that offer similar products or services to your target customers.

Competitor #1

Business Name:

What do they do well?

What opportunities do you see for improvement?

How will your business be different?

Competitor #2

Business Name:

What do they do well?

What opportunities do you see for improvement?

How will your business be different?

Competitor #3

Business Name:

What do they do well?

What opportunities do you see for improvement?

How will your business be different?

Competitive Advantage Summary

After reviewing your competitors, summarize what makes your business unique.

Consider:

- ☐ Customer Service
- ☐ Product Quality
- ☐ Pricing
- ☐ Convenience
- ☐ Specialized Expertise
- ☐ Innovation
- ☐ Community Involvement
- ☐ Local Ownership
- ☐ Industry Experience
- ☐ Other: _____

My Competitive Advantage:

Marketing Plan

Brand Message

Marketing Channels

- ☐ Website
- ☐ Social Media
- ☐ Email Marketing
- ☐ Networking
- ☐ Print Advertising
- ☐ Events
- ☐ Referral Program
- ☐ Other: _____

Customer Acquisition Strategy

How will you attract customers?

Customer Retention Strategy

How will you keep customers coming back?

Operations Plan

Daily Operations

Equipment Needed

Suppliers and Vendors

Technology and Software

Staffing Requirements

Management and Organization

Owner Information

Key Team Members

Name	Position	Responsibilities
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Professional Advisors

Accountant: _____

Attorney: _____

Business Advisor/Mentor: _____

Financial Plan

Startup Costs

ITEM	EST. COST
EQUIPMENT	
INVENTORY	
MARKETING	
LISCENSES & PERMITS	
INSURANCE	
TECHNOLOGY	
OTHER	
TOTAL STARTUP COSTS	

Revenue Projections

Year 1 Revenue Estimate

\$ _____

Year 2 Revenue Estimate

\$ _____

Year 3 Revenue Estimate

\$ _____

Monthly Cash Flow Forecast

Attach a Cash Flow Worksheet if available.

Break-Even Analysis

When do you expect the business to become profitable?

Funding Request

Amount Requested

\$ _____

Intended Use of Funds

Expected Outcomes

Risk Assessment

Potential Challenges

Mitigation Strategies

How will you address these challenges?

Business Milestones

First 90 Days

First Year

Three-Year Goals

Appendix

Attach supporting documents as applicable:

- ☐ Resume(s)
- ☐ Financial Statements
- ☐ Market Research
- ☐ Licenses & Permits
- ☐ Product Photos
- ☐ Letters of Support
- ☐ Other Supporting Documents

Need Assistance?

The Vilas County Economic Development Corporation is available to assist entrepreneurs and business owners with:

- Business Planning
- Financial Resources
- Mentorship Opportunities
- Business Development Support
- Networking Connections
- Growth Strategies

For additional assistance, contact the Vilas County Economic Development Corporation.

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