

**[Organization Logo]**  
(if available)

**[Organization Name]**  
**BUSINESS PLAN**  
**[Current Month], [Year]**

**Commented [D1]:** Insert your Organization name.

**Commented [D2]:** Include current date.

**[Contact Name]**  
**[Title]**  
**[Organization Name]**  
**[Address 1]**  
**[Address 2]**  
**[City, State Zip]**  
**Tel: [ ]**  
**Fax: [ ]**  
**Email: [ ]**

**Commented [D3]:** Customize with your contact information.

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# I. Executive Summary

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## Overview

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Provide a brief overview on the details of your business.

### Services Offered

Give an overview of the services that your organization offers.

### Customer Focus

Briefly discuss your main customers. *TIP: Go to <http://zipskinny.com/> to find the demographics in the specific zip codes you desire! For even more detailed data, go to <http://factfinder.census.gov/servlet/ACSSAFFacts>.*

### Management Team

Talk about key points about yourself and other management team members if applicable.

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## **Success Factors**

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Include bullets detailing key factors why your Organization will succeed.

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## **Financial Highlights**

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Tell how much capital you need.

## II. Organization Overview

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### Who is [Organization Name]?

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Talk about who the Organization is and how/why it was founded.

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### [Organization Name]'s History

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Discuss key Organization accomplishments to date including the Organization timeline.

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### [Organization Name]'s Services

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Talk about the products and/or services that the Organization offers.

## III. Market Analysis

### Market Statistics & Trends

Provide an overview of the industry and include relevant statistics to show that you understand what is going on in the market.

## IV. Customer Analysis

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### Customers & Demographics

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Give an overview of the “customers” you will serve and the demographics of the areas.

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### Customer Segments

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We primarily target the following three “customer” segments:

## V. Competitive Analysis

### Direct & Indirect Competitors

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Identify your criteria for considering another Organization as a competitor. Provide a description of each competitor and why you think you serve a different need than them.



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## **Competitive Advantage/Differentiation**

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Explain the key advantages you have over other organizations in serving your customer segments.

## VI. Marketing Plan

The Marketing Plan describes the type of brand [Organization Name] seeks to create and the Organization's planned promotions and pricing strategies.

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### The [Organization Name] Brand

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Explain the key attributes that your brand will convey.

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### Promotions Strategy

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Discuss the key tactics you will use to promote your organization.

# Operations Plan

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## **Functional Roles**

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Provide an overview of the key roles that you have or will need to run the organization.

### **Executive Functions**

### **Administrative Functions**

### **Service Functions**

### **Special Functions**

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## Milestones

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Provide a timeline for future accomplishments to show your pathway to success.

Date	Milestone
[Date 1]	
[Date 2]	
[Date 3]	
[Date 4]	
[Date 5]	

## Management Team

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### Management Team Members

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Include the founder's bio and the bio of all other management team members or key employees, highlighting what makes each a good fit for the Organization.

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### Hiring Plan

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Discuss any new hires that will be needed.

## Financial Plan

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### Revenue and Cost Drivers

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Discuss the main sources of revenues and expenses.

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### Capital Requirements and Use of Funds

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Tell how much capital you need and specifically how these funds will be used.

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## Key Assumptions & Forecasts

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Fill in key assumptions of dollar amounts expected to be raised concerning the financial forecast and projections over the next five years.

### Key Assumptions

Individual Donations	
Year	Dollars Raised
FY 1	\$ _____
FY 2	\$ _____
FY 3	\$ _____
FY 4	\$ _____
FY 5	\$ _____

Corporate Donations	
Year	Dollars Raised
FY 1	\$ _____
FY 2	\$ _____
FY 3	\$ _____
FY 4	\$ _____
FY 5	\$ _____

## Appendix

Please fill in pertinent appendices to the organization and provide a copy to be included in your final plan.

*Ex. Certifications/Accomplishments/Community Awards, Acknowledgements and or Partners/ Itemized Income vs Expense Reports/Budget Justification/Evaluation Plan*

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