

BUSINESS PLAN WORKSHEET

The Company

Ownership: Which business structure did you choose and why?

Sole Proprieter

Limited Liability Company

Partnership

C Corp

S Corp

501 3C Nonprofit

Reason you choose this business structure:

History: (For Start-up, explain why you choose this business)

Products & Services

Products/Services Summary:

List of Clients, Previous & Existing: (Name of Client, Amount of Purchase, date of sale/service)

Name of Client

Amount of Purchase

date of sales/service

Prices / Fees / Contracts: (what do you charge and why)

BUSINESS PLAN WORKSHEET

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Prices / Fees / Contracts: (what do you charge and why)

Marketing Analysis

What Industry does your business identifies with? _____

How many companies represent this industry nationwide? _____

How many companies represent this Industry Statewide? _____

How many companies represent this Industry Countywide? _____

List all the different types of customer that exist for your product/service

1) _____ 2) _____ 3) _____

4) _____ 5) _____ 6) _____

7) _____ 8) _____ 9) _____

Target Market Segment: (Who are your Ideal Customers):

1) _____ 2) _____ 3) _____

Risk Analysis: (List all weakness and threats your business faces)

Marketing Strategy

Competitive Edge: (What makes you stand out or appeal to potential customers)

Sales Strategy: (How to Close the Sale)

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Product / Service Summary

Provide a detailed description of your product/service and its cost or what you charge for your service.

Marketing Analysis

List all the different types of customer that exist for your product/service

- 1) _____ 2) _____ 3) _____
4) _____ 5) _____ 6) _____
7) _____ 8) _____ 9) _____

Target Market Segment: (List the Three Best or Ideal Customers):

- 1) _____ 2) _____ 3) _____

Risk Analysis: (List all weakness and threats your business faces, plus explain how you will overcome each threat)

- 1) _____

2) _____

3) _____

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12 Month Marketing Plan

Your 12 month marketing plan should outline what marketing strategies you will implement so that you can achieve your profit goals. Explain clearly how much income or how many clients you want to have at the end of this 12 month marketing plan?

Key Marketing Activities

List, (by title only) each marketing activity to be implemented over the next 12 months.

- | | |
|----------|----------|
| 1) _____ | 2) _____ |
| 3) _____ | 4) _____ |
| 5) _____ | 6) _____ |

Marketing Budget for each Activity

Provide a monthly cost estimate or breakdown for each Key Marketing Activity

- | | |
|----------|----------|
| 1) _____ | 2) _____ |
| 3) _____ | 4) _____ |
| 5) _____ | 6) _____ |

Based on the above figures, we have a yearly marketing budget of _____

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Implementing Your Marketing Plan

Provide a detailed explanation to each question. (Use a separate sheet if necessary)

Marketing Activity #1_____

What exactly do you expect to achieve with this marketing activity?

What research did you do before deciding on this activity?

Do your competitors use this marketing activity to get customers? If so, how will you stand out against the competition?

Marketing Activity #2_____

What exactly do you expect to achieve with this marketing activity?

What research did you do before deciding on this activity?

Do your competitors use this marketing activity to get customers? If so, how will you stand out against the competition?

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Implementing Your Marketing Plan

Provide a detailed explanation to each question. (Use a separate sheet if necessary)

Marketing Activity #3 _____

What exactly do you expect to achieve with this marketing activity?

What research did you do before deciding on this activity?

Do your competitors use this marketing activity to get customers? If so, how will you stand out against the competition?

Marketing Activity #4 _____

What exactly do you expect to achieve with this marketing activity?

What research did you do before deciding on this activity?

Do your competitors use this marketing activity to get customers? If so, how will you stand out against the competition?

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Implementing Your Marketing Plan

Provide a detailed explanation to each question. (Use a separate sheet if necessary)

Marketing Activity #5_____

What exactly do you expect to achieve with this marketing activity?

What research did you do before deciding on this activity?

Do your competitors use this marketing activity to get customers? If so, how will you stand out against the competition?

Marketing Activity #6_____

What exactly do you expect to achieve with this marketing activity?

What research did you do before deciding on this activity?

Do your competitors use this marketing activity to get customers? If so, how will you stand out against the competition?

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