**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=12324&utm_source=template-word&utm_medium=content&utm_campaign=Blank+5-Year+Business+Plan-word-12324&lpa=Blank+5-Year+Business+Plan+word+12324)5-Year Business Plan Template**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Executive Summary | |  |  |  |  |
| Purpose of the Plan |  | | | | |
| 5-Year Vision |  | | | | |
|  |  |  |  |  |  |
| **Metric** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Revenue ($) | $0 | $0 | $0 | $0 | $0 |
| Profit Margin (%) | 0% | 0% | 0% | 0% | 0% |
| Customer (#) | 0 | 0 | 0 | 0 | 0 |
|  |  |  |  |  |  |
| Funding Needs |  | | | | |
|  |  |  |  |  |  |
| Business Overview | |  |  |  |  |
| Mission, Vision,  and Values |  | | | | |
| Industry Overview |  | | | | |
| Competitive Advantage |  | | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| SWOT Analysis | |  |  |  |  |
| Strengths | | | Weaknesses | | |
|  | | |  | | |
|  | | |  | | |
|  | | |  | | |
|  | | |  | | |
|  | | |  | | |
|  |  |  |  |  |  |
| Opportunities | | | Threats | | |
|  | | |  | | |
|  | | |  | | |
|  | | |  | | |
|  | | |  | | |
|  | | |  | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Problem and Solution | |  |  |  |  |
| Problem Statement |  | | | | |
| Solution Offering |  | | | | |
|  |  |  |  |  |  |
| Target Market | |  |  |  |  |
| Market Analysis |  | | | | |
|  |  |  |  |  |  |
| **>>>> Customer Segments** | | | | | |
| **Segment** | **Description** | | **Size (% of Market)** | **Key Needs** | |
|  |  | |  |  | |
|  |  | |  |  | |
|  |  | |  |  | |
|  |  | |  |  | |
|  |  | |  |  | |
|  |  |  |  |  |  |
| **>>>> Market Growth Projections** | | | | | |
| **Year** | **Market Size ($)** | | **Market Share (%)** | **Customer Base (#)** | |
| Year 1 |  | |  |  | |
| Year 2 |  | |  |  | |
| Year 3 |  | |  |  | |
| Year 4 |  | |  |  | |
| Year 5 |  | |  |  | |
|  |  |  |  |  |  |
| Product or Service Offering | | |  |  |  |
| Core Products / Services |  | | | | |
|  |  |  |  |  |  |
| **>>>> Offerings Roadmap** | | | | | |
| **Year** | **Initiatives** | | **Milestones** | | |
| Year 1 |  | |  | | |
| Year 2 |  | |  | | |
| Year 3 |  | |  | | |
| Year 4 |  | |  | | |
| Year 5 |  | |  | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Marketing and Sales Plan | | |  |  |  |
| Marketing Strategy |  | | | | |
| Sales Strategy |  | | | | |
| Sales Process |  | | | | |
|  |  |  |  |  |  |
| **>>>> Sales Targets** | | | | | |
| **Year** | **Revenue Target ($)** | **Units Sold (#)** | **Average Deal Size ($)** | **Customer Growth (%)** | |
| Year 1 |  |  |  |  | |
| Year 2 |  |  |  |  | |
| Year 3 |  |  |  |  | |
| Year 4 |  |  |  |  | |
| Year 5 |  |  |  |  | |
|  |  |  |  |  |  |
| **>>>> Sales and Marketing Goals** | | | | | |
| **Year** | **Goal** | | **KPIs** | | |
| Year 1 |  | |  | | |
| Year 2 |  | |  | | |
| Year 3 |  | |  | | |
| Year 4 |  | |  | | |
| Year 5 |  | |  | | |
|  |  |  |  |  |  |
| **>>>> Key Sales Metrics** | | | | | |
| **Metric** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Conversion Rate (%) |  |  |  |  |  |
| Customer Acquisition Cost (CAC) ($) |  |  |  |  |  |
| Average Deal Closure Time (Days) |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Financial Plan | |  |  |  |  |
| **>>>> Detailed Projections** | | | | | |
| **Metric** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Revenue ($) |  |  |  |  |  |
| Operating Costs ($) |  |  |  |  |  |
| Net Profit ($) |  |  |  |  |  |
|  |  |  |  |  |  |
| 5-Year Timeline and Milestones | | | |  |  |
| **Year** | **Strategic Goals** | **Key Initiatives** | | **Milestones** | |
| Year 1 |  |  | |  | |
| Year 2 |  |  | |  | |
| Year 3 |  |  | |  | |
| Year 4 |  |  | |  | |
| Year 5 |  |  | |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| Appendices | |  |  |
| **Document Type** | **Description** | | |
|  |  | | |
|  |  | | |
|  |  | | |
|  |  | | |
|  |  | | |

|  |
| --- |
| **DISCLAIMER**  Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |