

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 (\$)					
Profit Margin (%)					
Customer (#)					

Funding Needs	
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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	
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>>>> 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	
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>>>> 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

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