**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=12399&utm_source=template-word&utm_medium=content&utm_campaign=5-Year+Business+Plan-word-12399&lpa=5-Year+Business+Plan+word+12399)5-Year Business Plan Template**

|  |  |  |  |  |  |
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| 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 |  | | | | |

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| SWOT Analysis | |  |  |  |  |
| Strengths | | | Weaknesses | | |
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|  |  |  |  |  |  |
| Opportunities | | | Threats | | |
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| Problem and Solution | |  |  |  |  |
| Problem Statement |  | | | | |
| Solution Offering |  | | | | |
|  |  |  |  |  |  |
| Target Market | |  |  |  |  |
| Market Analysis |  | | | | |
|  |  |  |  |  |  |
| **>>>> Customer Segments** | | | | | |
| **Segment** | **Description** | | **Size (% of Market)** | **Key Needs** | |
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|  |  |  |  |  |  |
| **>>>> 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 |  | |  | | |

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| 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) |  |  |  |  |  |

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| 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 |  |  | |  | |

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