

5-Year Strategic Business Plan Template

Executive Summary

Purpose of the Plan	
5-Year Vision	
Funding Needs	

Metric	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue (\$)					
Customer Base(#)					
Net Profit Margin (%)					

Vision, Mission, and Strategic Objectives

Mission Statement	
Vision	
Strategic Objectives	

Market Analysis

Competitor	Strengths	Weaknesses

SWOT Analysis

Internal Factors	
Strengths (+)	Weaknesses (-)
External Factors	
Opportunities (+)	Threats (-)

Key Challenges and Strategic Solutions

Key Challenges	
Strategic Solutions	

Strategic Initiatives Roadmap

Year	Initiatives	Milestones
Year 1		
Year 2		
Year 3		
Year 4		
Year 5		

Marketing and Sales Plan

Marketing Focus

Sales Focus

Year-Over-Year Marketing and Sales Focus

Year	Focus Area	Key Initiative	Milestone
Year 1			
Year 2			
Year 3			
Year 4			
Year 5			

Financial Plan

Financial Strategy Overview

Resource Type	Year 1 (\$)	Year 2 (\$)	Year 3 (\$)	Year 4 (\$)	Year 5 (\$)
Product Development					
Marketing and Branding					
Staffing and Operations					

Performance KPIs

Category	KPI	Year 1	Year 2	Year 3	Year 4	Year 5

Strategic Goals and Milestones

	A	B	C	D	E
F					
G					
H					
I					
J					
K					

Appendices

Document Type	Description	Purpose

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