

Small Business Plan Template



Small Business Plan

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Executive Summary

Purpose of the Plan

Business Objectives

Key Business Metrics

Metric	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Annual Total
Revenue (\$)					
Customer acquisition cost (\$)					
Customer (#)					

Business Overview

Mission

Vision

Business Description

Owner Profile

SWOT Analysis

Strengths	Weaknesses

Opportunities	Threats

Local Market Analysis

Local Competition

Community Trends

Zoning or Location Factors

Target Market

Customer Segments

Market Opportunity

Key Customer Groups

Segment	Size (\$ or %)	Key Needs	Channel

Buying Behavior

Product or Service Offerings

Core Offerings

Business Hours and Location

Vendor or Supplier Information

Key Customer Groups

Quarter	Initiative	Milestone
Q1		
Q2		
Q3		
Q4		

Marketing and Sales Plan

Marketing Strategy

--

Sales Channels

--

Customer Retention

--

Competitive Positioning

Competitor Overview

--

Differentiators

--

Business Operations

Daily Operations

--

Key Partners or Contractors

--

Technology and Tools

--

Team and Hiring Plan

Leadership Overview

--

Key Roles and Gaps

--

Quarterly Performance

Quarter	Goal	KPIs
Q1		
Q2		
Q3		
Q4		

Financial Plan

Overview

Startup or Expansion Costs

Quarterly Projections

Metric	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Annual Total
Revenue (\$)					
Customer acquisition cost (\$)					
Customer (#)					

Timeline and Milestones

Quarter	Strategic Goal	Key Initiative	Milestone
Q1			
Q2			
Q3			
Q4			

Appendices and Supporting Documents

Document Type	Description

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