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**Small Business Plan Template**



Small Business Plan

**Company Name**

Prepared By: Name

Date Prepared: MM/DD/YY

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Executive Summary

Purpose of the Plan

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Business Objectives

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|  |

Key Business Metrics

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

Business Overview

Mission

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Vision

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Business Description

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Owner Profile

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SWOT Analysis

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| **Strengths** | **Weaknesses** |
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| --- | --- |
| **Opportunities** | **Threats** |
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Local Market Analysis

Local Competition

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Community Trends

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Zoning or Location Factors

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Target Market

Customer Segments

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Market Opportunity

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Key Customer Groups

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| --- | --- | --- | --- |
| **Segment** | **Size ($ or %)** | **Key Needs** | **Channel** |
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Buying Behavior

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Product or Service Offerings

Core Offerings

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Business Hours and Location

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Vendor or Supplier Information

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| --- |
|  |

Key Customer Groups

|  |  |  |
| --- | --- | --- |
| **Quarter** | **Initiative** | **Milestone** |
| Q1 |  |  |
| Q2 |  |  |
| Q3 |  |  |
| Q4 |  |  |

Marketing and Sales Plan

Marketing Strategy

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Sales Channels

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Customer Retention

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Competitive Positioning

Competitor Overview

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Differentiators

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Business Operations

Daily Operations

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Key Partners or Contractors

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Technology and Tools

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Team and Hiring Plan

Leadership Overview

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Key Roles and Gaps

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Quarterly Performance

|  |  |  |
| --- | --- | --- |
| **Quarter** | **Goal** | **KPIs** |
| Q1 |  |  |
| Q2 |  |  |
| Q3 |  |  |
| Q4 |  |  |

Financial Plan

Overview

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Startup or Expansion Costs

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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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