



Business Plan Template

Business Overview

Explain your business. What do you offer?

Mission and Culture

Define why you exist.

Target Market

Who is your customer? What do they do? Where are they?

Services and Offerings

What do you offer your customers? What do you sell?

Market Overview and Competition

Who are your competitors (direct and indirect)?

Business Organization and Management

Staffing

What staff positions do you need in your business? Think immediate and long term.

Software

What software tools do you need to operate your business? (e.g., CoWello)

Bookings

Pricing and Retention Strategies

Pricing

Client Retention

Check out our [Retention Guide](#) for strategies.

Marketing and Sales

Brand Identity

Define who your brand is and what it looks like.

Website

Define what you need to share on your website to attract and convert leads into customers.

Social Media

What social media accounts do you need to interact with your customer base?

Paid Advertising

Will you run paid advertisement? If so, where and what's your budget?

Public Relations

What media relations do you need to build?

Partnerships

Are there businesses who share your target customer? If so, how can you work together?

Go To Market

Define your marketing strategy to get your first customers. Set a goal and a plan to achieve it.

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Equipment and Products

Equipment Needs

Type of Equipment	Quantity	Price per Unit	Projected Cost
Totals			

Product Needs

Type of Products	Quantity	Price per Unit	Projected Cost
Totals			

Finances

Costs

What are the costs to running your business?

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Type of Product	Monthly Cost	Annualized Cost	Y2 Costs	Y3 Costs
Totals				

Key Performance Indicators (KPIs)

Success Measurements

What does success look like?

Breakeven Analysis

What revenue do you need to break even with your costs while supporting your growth?

	Total Costs	Total Revenue	Profit
Month 1			
Month 2			
Month 3			
Month 4			

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