


New York StartUP!  
Business Plan Competition  
**Business Planning**  
**Research and Resources**

Presented by  
Paisley Demby, CEO  
PBN Consulting, LLC  
[www.pbnconsulting.com](http://www.pbnconsulting.com)



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**Contents**

- What is a Business Plan
- Where to Begin
- Why Write a Business Plan
- Feasibility
  - Operational, Financial, Checklist
- The Key Elements
- Required Sections of the Plan
- How to Conduct Research
- Resources to Help You Write
- Q&A

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**What is a Business Plan?**

**Definition:**

A business plan is a document that summarizes the **operational** and **financial objectives** of a business and contains the **detailed plans, target dates** and **budgets** showing how the objectives are to be realized and who will complete the task.



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**Where Does One Begin?**

**NAICS Codes**

The North American Industry Classification System (NAICS) has replaced the U.S. Standard Industrial Classification (SIC) system. NAICS will reshape the way we view our changing economy.

**Goto - <http://www.census.gov/eos/www/naics/>**


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**NAICS Code**


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**Where Does One Begin?**

**Associations**

- **Encyclopedia of Associations**
- **Trade Journals**


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**Where Does One Begin?** 


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**Talk to people in your industry**

- Existing business owners
- Those in your supply chain
- Potential customers
- MeetUp, Yahoo, Google Groups

**How to identify those in your industry**

- Business expos, conferences, tradeshows

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**Why Write a business Plan?** 

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**The Business Owner**


- Feasibility/Viability
- Operating assessment
- Communicates your business to others
- Serves as a basis for a financing proposal
- A blueprint and communication tool for your business.

**Banks**

- Do you know your business inside out
- Ability to repay their loan to you

**Investors**

- Do you know your business inside out
- Above average returns, exit strategy

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**Feasibility: General** 

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1. Is there **demand** for your product/service?
2. Is there a **sizeable market** for your product/service?
3. Are there **competitors** in your market?
4. Is there an **underserved niche market**?
5. How will you **reach your target market**?
6. Can you develop **sufficient revenue** to grow this business ?
7. Do you have the necessary management, sales, marketing, finance and operations **experience**?

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### Feasibility: Financial

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1. Do you have **sufficient capital** to start your business?
2. What is the **cost to develop** your product / service?
3. Is **financing available** and do you qualify for it?
4. What are the **operating cost** to run your business?

<p><b>Personal Expense</b></p> <p>Salary Vacation Savings</p> <p>+ <b>Business Expenses</b> = <b>Target Revenue</b></p>	<p><b>Target Revenue</b> <small>Average Price of Product /Service</small></p> <p>= # of Product/Service</p>
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### The Key Elements

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**Cover Page**

**Table of Contents (with page numbers)**

**Executive Summary**

**Section I - The Business**

**Section II - Financial Data**

**Section III - Supporting Documentation**

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### Cover Page

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**Identify the following:**

- Name of the company
- Purpose of document
- Company address
- Company phone number (include area code)
- Logo (if you have one)
- Names, titles, addresses, phone numbers (include area code) of owners
- Month and year in which the plan is issued
- Name of preparer

**Best Business Idea, Inc  
Business Plan**

To be Submitted to  
New York StartUP! Business Plan  
Competition  
June 18, 2010

John Doe  
Founder and CEO  
Best Business Idea, Inc  
123 SomeStreet  
Anytown, NY 10000  
Phone: 555.555.5555  
Fax: 555.555.5555  
Email: joe@bbi.com

Plan prepared June 2010  
by John Doe

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**Elements of a Business Plan** 

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**Elements of a Business Plan**

1. Executive Summary ✓	(Chapter 4)
2. Company Description ✓	(Chapter 5)
3. Industry Analysis and Trends ✓	(Chapter 6)
4. Target Market Analysis	(Chapter 7)
5. The Competition ✓	(Chapter 8)
6. Strategic Position/Risk Assessment ✓	(Chapter 9)
7. Marketing Plan (Workshop #2)	(Chapter 10)
8. Operations ✓	(Chapter 11)
9. Management & Organization ✓	(Chapter 13)
10. Milestones and Exit Plan ✓	(Chapter 15)
11. The Appendix ✓	(Chapter 17)

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**1. Executive Summary (Chapter 4)** 

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Write this summary last. The Executive Summary contains the **highlights** of your plan. It is often considered the most crucial part of the plan because it is the first section your readers will see and is designed to capture their attention and draw them into reading further.

**2 Types:**  
 Synopsis Summary – The conclusion of each section  
 Narrative Summary – Its like telling a story

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**1. Executive Summary (Chapter 4)** 

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The Executive Summary should touch on most of the areas of the business plan, including.

- Your significant **products and/or services**.
- What makes the business **unique**, or distinctive.
- The **target market** analysis, and customer
- An overview of the **management team**.
- How your company will succeed in the future.
- The current **competition** in the market.
- Funds requested and how they will be used.
- Summary of your future **financial projections**

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**2. Company Description (Chapter 5)** 

- Legal structure (C-Corp, LLC, Sole Proprietorship)
- Ownership structure
- **Product / Service description**
- Legal (patents, trademarks, copyrights)
- Type of business (product/service or combination)
- Names of key managers, board members
- **Location** (where you will be based)
- Financial status

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**Products (or Service) Description** 

**Key Points:**

- What exactly is the product or service?
- What are its key **features** and **benefits**?
- What is the **Unique Selling Proposition (USP)**
- Is the product / technology proprietary?
- If so, is it protected by patents?
- Why will potential customers want to buy it?

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**Products (or Service) Description** 

- Avoid technical jargon
- List the product/service (if several, list majors)
- Use pictures and or diagrams if necessary
- Typical questions:
  - What is it?
  - How does it work?
  - What does it do?
  - What need does it fill?
  - What problems does it solve?
  - What is unique about it?
  - Why will your customers buy it?

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### Location of Business



When describing the location of your business consider the following:

- What are your location needs?
- What kind of building/storefront do you need?
- Why is this a desirable area or desirable building?
- How do you plan to keep an eye on demographic shifts in your area?
- Accessible by car, train, bus, railroad?



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### Space Requirements



- Space and location are important to stores, restaurants, manufacturing and other types of businesses
- Describe the neighborhood or desired location and its importance
- Describe the space; will you remodel, will you rent or buy, what will it cost?
- Research the costs of remodeling!
- Know the prevailing rates (leases per sq ft)



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### 3. Industry Analysis (Chapter 6)



- Size and growth of your industry
- Maturity of industry
- Sensitivity to economic cycles
- Seasonality
- Technological factors
- Regulatory issues
- Supply and distribution
- Financial considerations
- **Anticipated changes** and **trends** in the industry



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**Market Research Reports** 

Companies and publishers produce and sell reports to clients or to the public. Electronic Resources at SIBL for finding Market Research Reports include:

- [MarketResearch.com \(Academic\)](#)
- [Market Research Monitor](#)
- [Business Source Premier \(EBSCO\)](#)
- [eMarketer](#) (For information related to e-business, online marketing and emerging technologies.)

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**Journal Articles and Statistics** 

Searching for Articles and Statistics using Electronic Resources

- [Business Essentials](#)
- [Business Source Premier \(EBSCO\)](#)
- [FACTIVA](#)
- [TableBase](#)

County Business Patterns (U.S. Census)  
[www.census.gov/epcd/cbp/view/cbpview.html](http://www.census.gov/epcd/cbp/view/cbpview.html)

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**Industry Information – Trade Journals** 

**Trade Journals**

Directories which list trade journals for different industries.

- [Ulrichs International Periodicals Directory](#)
- [Directory of Business Information Resources](#)
- [World Directory of Trade and Business Journals](#)
- [Directory of Business Periodical Special Issues](#)

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### Industry Info – Profiles, Trends



Databases which list industry profiles, trends, statistics, and associations.

- **First Research**
- **Plunkett Research**
- **Standard & Poor's Industry Surveys (S&P NetAdvantage)**




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### 4. Target Market Analysis (Chapter 7)



Your target market is simply any group of current or potential consumers of your product or service.

Once you have identified your target market, break it down into smaller **segments** so that you can direct your marketing and sales efforts at the segments that are most likely to buy your products or services.




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### 4. Target Market Analysis (Chapter 7)



Define your "typical" customer or target audience, in terms of

- **Demographic:** What age, gender, industry are they? What is their size in number of children/employees? What do they do for a living?
- **Geographics:** Where do they live? What is their income and buying power?
- **Psychographics** What is their lifestyle like? Consider their personality, values, attitudes, interests, and motivations.




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### Target Market Analysis (Chapter 7)



Once you have all this information, you'll write the Target Market Analysis in the form of several short paragraphs. Use appropriate headings for each paragraph. If you have several target markets, you may want to number each.

Also consider the following

- **Purchasing patterns**
- **Buying sensitivity**
- **Size and trends of market**




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### Target Market Research



**Reference USA** - Residential and 14 million businesses in the United States and Canada. S

#### Residential

- Name, Address, City, State, ZIP Code +4
- Telephone Number
- Median Household Income
- Median Home Value
- Percentage of Owner-Occupied Housing

#### Business

- Subsidiary information
- Management Information
- Location – radius search
- Credit Rating




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### Target Market Research



#### Infoshare Online

- Profile a neighborhood of your choosing
- Compare neighborhoods across the city and the state

#### Demographics USA

Country Edition

Zip Edition

#### American Incomes:

Demographics of Who Has Money




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**Spending Habits and Target Markets** 

**Survey of Buying Power**  
 (a special issue of the journal Sales & Marketing Management)

**Household Spending**  
 American Generations: Who they are. How they live. What they think. (Two more titles from New Strategist Publications. For more information, visit [www.newstrategist.com](http://www.newstrategist.com))

**Consumer Expenditure Survey** [www.bls.gov/cex](http://www.bls.gov/cex)

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**Target Market - Clients Demographics** 

**Census Bureau's Web site** access to selected data from the Population Survey

**Statistical Abstract of the United States**- contains a wealth of statistical information on various aspects of the U.S. population

**American Demographics** is also a good source of demographic and statistical information.

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**Target Market - Clients Demographics** 

**United States Census / American Factfinder**  
 The easiest way to search for demographic information on the Census Bureau's Web site

<http://factfinder.census.gov>

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**Competitive Analysis (Chapter 8)** 

Never say "we have no competition." No one will believe you!

- Who are your competitors, **direct** and **indirect**?

**Competitive Position**

- What **differentiates** your products and services from theirs?
- What are their/your **strengths, weaknesses** and are there **opportunities and threats (SWAT)**?

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**Competitive Analysis (Chapter 8)** 

Also consider the following:

- Competitive Analysis**
- Market Share and Distribution**
- Barriers to Entry**
- Potential / Future Competitive Challenges**

Descriptions, tables, and diagrams are good ways to present your competitive analysis

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**Competitive Analysis (Chapter 8)** 

Use a comparative assessment to evaluate Competitors:

(Sample)

Comparative Competitor Analysis						
	Product	Quality	Price	Service	Location	Brand
Company 1	5	5	4	5	1	2
Company 2	3	2	1	4	4	4
Your Company	5	3	2	3	4	3

Or use something more visual:

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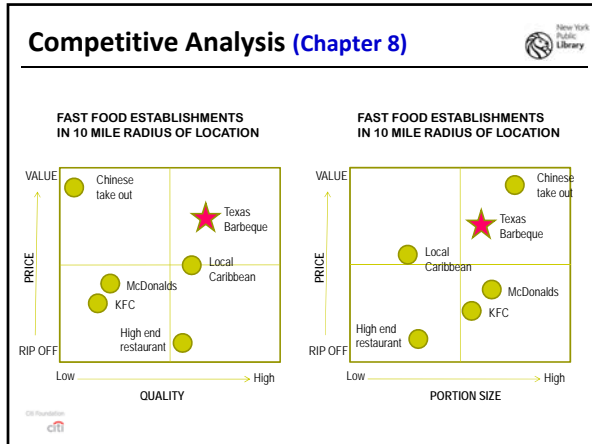
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### Competitors, Clients, Suppliers

**Reference USA** - Residential and 14 million businesses in the United States and Canada. S

Residential

- Name, Address, City, State, ZIP Code +4
- Telephone Number
- Median Household Income
- Median Home Value
- Percentage of Owner-Occupied Housing

Business

- Subsidiary information
- Management Information
- Location – radius search
- Credit Rating

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### Competitors, Clients, Suppliers

**ThomasNet (Thomas Register) [www.thomasnet.com](http://www.thomasnet.com)**

Search ThomasNet to find

- Manufacturers
- Distributors
- Service providers

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**Competitors, Clients, Suppliers** 

**D&B's Million Dollar Databases**

- Find specific companies, or search by specific industries.
- Size new markets by using multiple selection criteria.
- List potential prospects or prospective employers in a targeted market.
- Identify key decision-makers so you can contact them directly.

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**Company Information- Annual Reports** 

**Hoovers**  
**FreeEdgar**  
**Tenkwizard**

Annual Report (10K filings), press releases, stock quotes , company profiles, industry Information, marketing Plans, financial statements

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**Strategic Position and Risk Assessment** 

This is where your company can differentiate itself from the competition. The key is to find the strategy that best creates **real opportunities** in the competitive environment.

The following aspects should come together.

- Strengths and interest
- Industry trends and developments
- Market changes and opportunities
- Competitive changes and opportunities
- Risk analysis

} **Strategy**

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### Operations (Chapter 11)



Overview of the strategy for the day-to day implementation of the **business model**.

Demonstrate that you understand how the **daily operations** of the business will work.

It's important to discuss technology needed to help manage processes.



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### Marketing Plan (SKIP) (Chapter 11)



Details what marketing and sales activities the business will put in place to **generate sales** and lays out the **cost** associated with each activity. The purpose of marketing is to **create awareness** and drive sales. The marketing plan should concisely explain how your business will achieve those goals.

- Marketing strategy
- Marketing vehicles
- Marketing tactics and how they create sales



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### Books – NYPL Catalog



SIBL has a large collection of marketing and market research materials. For a list of available publications, search NYPL catalog for reference and circulating materials. Subject headings relevant to marketing may include:

- |                           |                            |
|---------------------------|----------------------------|
| <b>Consumer Behavior</b>  | <b>Market Surveys</b>      |
| <b>Consumers</b>          | <b>Market Segmentation</b> |
| <b>Marketing</b>          | <b>Target Marketing</b>    |
| <b>Marketing Research</b> |                            |

<http://catalog.nypl.org/>



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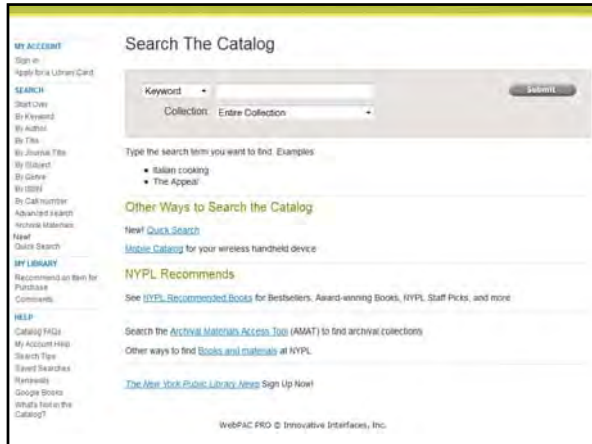
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**Operations (Chapter 11)** 

- Different types of companies have different operational components
- Explain how you will **make, distribute, deliver** your product and/or service
- What **internal processes** make or break your business
- What kind of **personnel**, equipment and space will your business require
- Useful tools **flow charts & time lines**

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**Manufacturing Ops (Chapter 11)** 

- Do you need skilled labor?
- What about packaging?
- Space requirements and location?
- Will you contract out some or all of the production?
- If not – What are your equipment needs? Your supply needs?

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**Service Business – Ops (Chapter 11)** 

**For Example:** Personal Trainer, Child Care, Travel agent, Website

- What technology and why?
- Personnel is key – credentials & skills
- Where will the service be performed?
- Identify space or equipment requirements
- Will you bill by the project or your time?

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**Retail Company Ops (Chapter 11)** 

**For Example:** Stores & Restaurants

- Location and space design is critical
- Suppliers – What are the product lines, what are the sales terms, are they reliable?
- How will you manage inventory?

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**Management & Organization (Chapter 13)** 

- Create an organizational chart with support staff
- List advisory board members

Strategy	Marketing	Sales	Operations	Finance
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- **Names of Top Management, Title**
- Responsibilities
- Relevant work experience and expertise
- Education

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**Personnel** 

- How many people do you need?
- Current personnel needs? In five years?
- What **skills** will your employees need?
- What will your needs be in five years?
- What will be your **wage scale**: Salary or hourly? Overtime? Fringe benefits? Taxes?
- How do you plan to **train** personnel for both operation and management ?
- How will you **hire** new employees?
- What **incentives** do your plan to offer?

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**Milestones & Exit Plan (Chapter 15)** 

Milestones sets the plan into practical, concrete terms, with real budgets, deadlines, and management responsibilities. It helps you focus as you are writing your business plan

This is where a business plan becomes [a real plan](#), with specific and measurable activities, instead of just a document.

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**Milestones Part I (Chapter 15)** 

Set as many milestones as you can think of to make it more complete. Give each milestone:

- name
- start date
- end date
- budget
- department
- person responsible

Table: Milestones

Milestones	Start Date	End	Budget	Manager	Department
Develop Business Plan and Mktg Plan	6/1/2003	2/1/2004	\$10,000	PBN	Business Development
Secure Corp Counsel	1/1/2004	2/1/2004	\$2,000	John Doe	Legal
Secure CFO/Accountant/CPA	1/1/2004	2/1/2004	\$1,500	John Doe	Finance
Secure Business Strategist/Advisor	12/1/2003	2/1/2004	\$0	John Doe	Business Development
Financial Lending	2/1/2004	4/30/2004	\$1,500	PBN	Finance
Incorporation	2/1/2004	3/1/2004	\$1,500	John Doe	Legal
Secure Marketer	2/1/2004	4/1/2004	\$0	John Doe	Marketing
Lease Agreement/Settlement	3/1/2004	5/1/2004	\$500	John Doe	Owners
Leasehold Improvement	4/1/2004	5/1/2004	\$7,500	John Doe	Owners
Secure Inventory	4/1/2004	4/1/2004	\$1,673	John Doe	Owners
Logo Design	4/1/2004	5/1/2004	\$1,000	John Doe	Owners
Design and Secure Business Cards	4/1/2004	5/1/2004	\$0	John Doe	Owners
Create Marketing Material	4/1/2004	4/1/2004	\$2,000	John Doe	Owners
Staff Hiring	4/1/2004	4/1/2004	\$0	John Doe	Owners
Hugs For Charity Grand Opening	5/1/2004	5/1/2004	\$3,750	John Doe	Owners
<b>Totals</b>			<b>\$32,523</b>		

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### Milestones Part II (Chapter 15)

A graphical representation of milestones allows the reader to quickly assess what task have been completed and what task run concurrently.

Task	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Develop Business Plan and Mtg Plan	█	█	█	█	█	█	█	█	█	█	█	█
Secure Corp Counsel								█	█	█		
Secure CFO/Accountant/CPA								█	█	█		
Secure Business Strategist/Advisor								█	█	█	█	█
Financial Lending									█	█	█	█
Incorporation									█	█	█	█
Secure Marketer									█	█	█	█
Lease Agreement/Settlement										█	█	█
Leasehold Improvement											█	█
Secure Inventory											█	█
Logo Design											█	█
Design and Secure Business Cards											█	█
Create Marketing Material											█	█
Staff Hiring											█	█
The KJ's Den Grand Opening												█

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### The Appendix (Chapter 17)

Include any documents which lend support to statements you have made in the body of the business plan. Items included will vary according to the needs and stages of development of your particular business. Some things which might be included:

- Resumes: **very important!**
- Estimates for any startup costs
- Quotes or estimates
- Supplier information

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### The Appendix (Chapter 17)

- Letters of Intent from prospective customers
- Copies of Leases
- Floor plans or other Agreements
- Sample logo, advertising, brochures
- Legal documents relevant to the business
- Photos and designs of products or location
- Census/Demographic data
- Contracts

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**TIPS to Writing Effectively** 

- ❑ **Be Concise**
  - 20 pages with no less than 1 line spacing  
(not including Cover Page, TOC, Financials, Appendix)
- ❑ **Engage and Convince Your Reader**
  - Articulate unique benefits your business offers
  - Capitalize on Industry Trend(s)
- ❑ **Write Clearly**
  - Answer the following questions  
Who, When, What, Why, Where, How?

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# RESEARCH

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**Why Do Market Research?** 

**Start-up Phase**

- Learn about your business environment/industry
- Study market characteristics
- Identify your potential customers
- Indentify competitors
- Select the best location for your business
- Key elements of your business /marketing plan
- Convince your banker and potential investors

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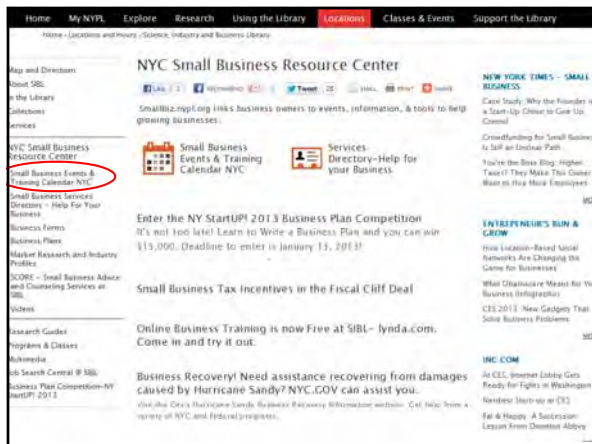
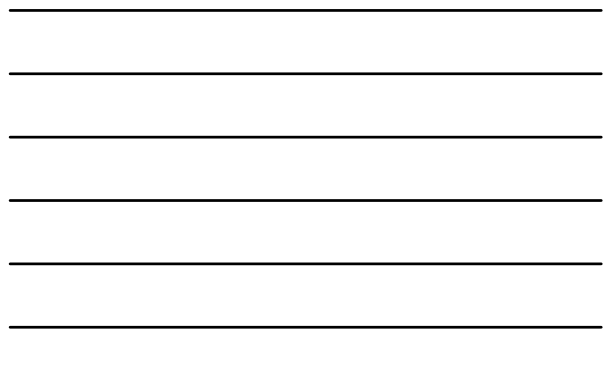
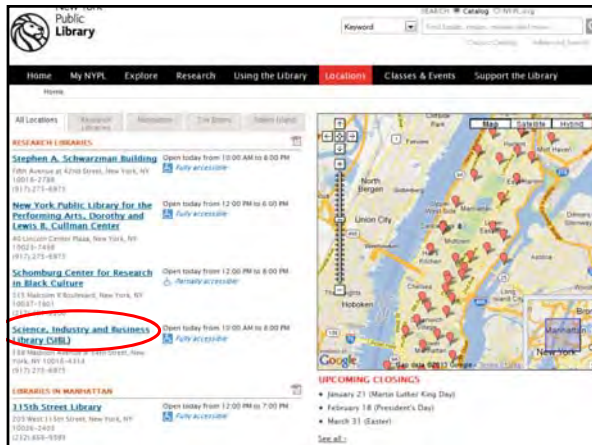
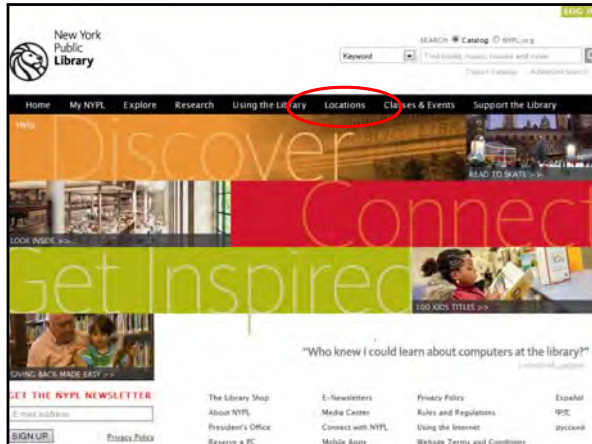
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Find upcoming top NYC business events by more organizations:

- Manhattan Chamber of Commerce**
- CoBiz New York Business**
- SCORE NYC**
- New York Emergency Report**
- NYU Workshop in Business Opportunities**
- NYC Business Solutions NYC.gov Training Courses**
- NY Enterprise Forum NYC**
- Columbia Higher EDUC**
- NABBO - National Association of Women Business Owners NYC**
- Small Business Administration**
- SCORE - South Bronx Overall Economic Development Corporation**
- Branch CANNY - Co-Op Field Center for Entrepreneurship**
- Greater New York Chamber of Commerce**

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### NYPL, Small Business Forms

New York City

- NYC Department of Consumer Affairs, Business Toolkits Main Page: <http://www.nyc.gov/html/dca/html/business/business.shtml>
- NYC Department of Finance, Business and Excise Tax Forms link: [http://www.nyc.gov/html/dof/html/pub/pub\\_business/qa.html](http://www.nyc.gov/html/dof/html/pub/pub_business/qa.html)
- NYC City Record Online, Search Procurement Bids and Awards: [http://aefl-citirecord.nyc.gov/nycvndoconline\\_home.asp](http://aefl-citirecord.nyc.gov/nycvndoconline_home.asp)
- Sell to NYC: <http://www.nyc.gov/html/sellto/cy.html/home/home.shtml>
- NYC Department of Health and Mental Hygiene, License, Permit, and Course Information: [http://www.nyc.gov/html/doh/html/pub/pub\\_license\\_permit/qa.html#faq](http://www.nyc.gov/html/doh/html/pub/pub_license_permit/qa.html#faq)
- NYC Department of Health and Mental Hygiene, Food Safety and Community Sanitation Permit applications, Requirements and forms: [http://www.nyc.gov/html/doh/html/pub/pub\\_permit/qa.html](http://www.nyc.gov/html/doh/html/pub/pub_permit/qa.html)
- NYC Department of Health and Mental Hygiene, Filing for a separate smoking room in a bar/restaurant: [http://www.nyc.gov/html/doh/html/pub/pub\\_permit/qa.html](http://www.nyc.gov/html/doh/html/pub/pub_permit/qa.html)
- NYC Department of Health and Mental Hygiene, Child Care, Obtaining a Permit for a Day Child Care Center
- NYC Department of Buildings, Form: <http://www.nyc.gov/html/dob/html/development/forms.shtml>

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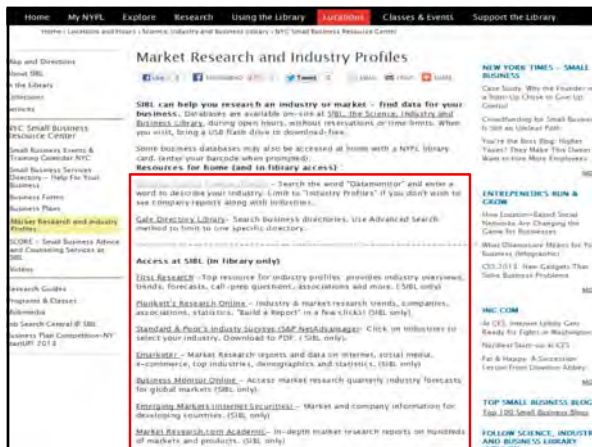
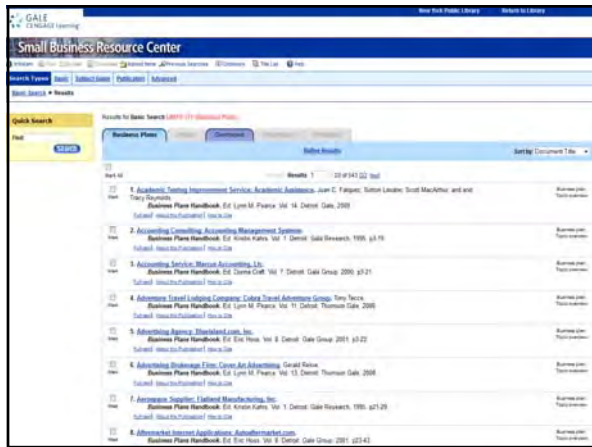
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**Industry Specific Directories**

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Jennifer: Small Business Online Marketing Tactics  
How to Build an Online Business



**Market Research: Information Sources for Small Business**



Guide to market research information resources available at the Science, Industry and Business Library. Presented by Ken Johnson, business librarian at the Science, Industry and Business Library.

- View seminar: Broadband Dial-up
- Download audio podcast (.mp3) (right click, then "save target as")
- Download Powerpoint presentation only (right click, then "save target as")

**A Quick Guide to Building a Successful Export Business**



Edward S. Dorian, Jr. is the President of Dorian Drake International, a leading export management company providing manufacturers with a full-service alternative to staffing and managing their own export department.

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- Download Powerpoint presentation only (right click, then "save target as")
- related: Click here to ask a question in our forum.

**Tips for Opening and Running a Restaurant in NYC**



E. Charles "Chuck" Hunt is the Executive Vice President of the New York State

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**Article Sources** 

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**News (Articles) for Industry Research**

**Regional Business News**  
Comprehensive full text coverage for regional business publications, including newspapers and newswires.

**New York Times**  
Provides articles in full text from 1980 to the present




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**Planning for Advertising** 

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**Lifestyle Market Analyst**  
**Marketer's Guide to Media (MediaWeek)**  
**Standard Rate and Data Service (SRDS)**

**Resources for advanced Advertising Planning:**  
**Mediamark Research Inc.**  
Order reports electronically at:  
www.mediamark.com

**Simmons Market Research Bureau**  
Order reports electronically at: www.smr.com




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**Resources** 



**nysbdc.org**

- Free entrepreneurial training
- Free business research assistance
- MBAs on staff
- PhDs on staff

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**Resources** 



**SBA.gov**

- Free Online Entrepreneurial Training
- Business Tools
- Local Resources
- Small Business Planner
- Online Business Chat

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**Resources** 



**smetoolkit.org**

- Online business planning, legal, operations, HR, marketing and sales resources

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### Avoiding Common Mistakes

- Plan not including an essential element
  - Table of Contents, Page Numbers, Cover Page with Contact information
- Disorganization of your plan
- Poor research and outdated market data
- Over-hype
- The numbers
  - Not knowing the numbers, Not including all required statements
- Inconsistencies across the plan
- No focus on your competition
- Not having a defined target market
- Spelling nad Garmamr**

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### Keys to a Good Plan

- Clearly Define your Product or Service
- Clearly Define your Target Market
- Know and Research Your Industry
- Identify your Competitive and Strategic Advantage(s)
- Develop a Strong Marketing Plan
- Develop Target Dates to Complete Milestones
- Articulate your Internal Operations
- Make Realistic Financial Projections
- Excellent Spelling and Grammar

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**Keys to a Good Plan** 

**What Judges will Remember**  
 A story such as we identified a **PROBLEM** and thought we could develop a **SOLUTION** so we developed a **TEAM** because

1. No one else was addressing this issue  
(Something New)
2. We thought we could provide a better SOLUTION  
(Something Better)
3. We thought we could serve an underserved market or Niche (Underserved or New Market)
4. We could deliver the product or service better  
(New Delivery System or Distribution Channel)
5. Increased Integration

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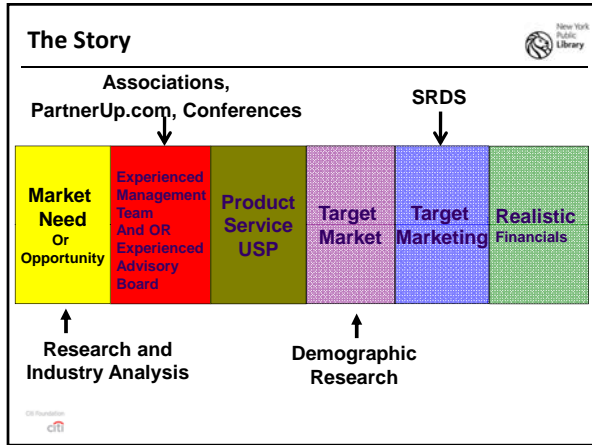
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**Q&A** 

**QUESTIONS**

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