

New York *StartUP!* 2017 Business Plan Competition Company Profile

Company Name:
Year Founded:
Contact Name:
Address:
City
State
Zip:
Email:
p:
f:
URL:
Industry:
Employees:

One Line Pitch:

Management Team:

Business Description

Product/Services:

Target Market:

Customer Problem:

Sales/Marketing Strategy:

Business Model:

Major Competitors:

Competitive Advantage:

FINANCIALS

Financials *	2017	2018	2019	2020
Revenues				
Expenditures				
Net				

* In Thousands (000) of USD

Your Company's Name Business Plan

To be submitted to
New York Public Library Science Industry and Business
Library New York StartUP! Business Plan Competition
June 7, 2017

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Plan prepared June 2017
by Your Name

Table of Contents

I.	Executive Summary.....	4
II.	Company Description	4
III.	Industry Analysis and Trends	4
IV.	The Target Market.....	5
V.	The Competition	5
VI.	Strategic Position & Risk Assessment Company Strengths	5
VII.	Marketing Plan and Sales Strategy	6
VIII.	Operations.....	6
IX.	Technology Plan (Optional)	6
X.	Management and Organization	7
XI.	Development, Milestones & Exit Plan.....	8
	Milestones Chart.....	8
XII.	The Financials	9
XIII.	Appendix	9

I. Executive Summary

(Complete Last – Chapter 4 – The Successful Business Plan)

This is the first section the reader will see. The purpose of the executive summary is to capture the interest of the reader so they will want to find out more about your company. These readers are likely to spend no more than 3 to 5 minutes before making a preliminary decision about your proposal. Therefore, this section is first and, in some ways, the most important. This section should emphasize key issues and be no longer than one page.

Logically, it's best to write this section last, after you've thought through the remaining sections.

- Provide a brief summary of the plan and explain how it is organized.
- There are two approaches
 - Narrative – Reads like a story
 - Synopsis – Summaries each section of the plan

II. Company Description

(Review Chapter 5 – The Successful Business Plan)

This section of the Business Plan should provide the reader with a more detailed overview of the company and the nature of the product/service offering. It could include the following:

- Legal name and Legal Form of business entity
- Mission Statement and Objectives
- History behind the idea or current business
- Product/Service Description (features and benefits)
- Intellectual Property Description
- Location and Geographical Information
- Company's Development stage
- Current financial position
- Achievements to date

III. Industry Analysis and Trends

(Review Chapter 6 – The Successful Business Plan)

The main objective of this section is to convince the reader that a market opportunity exists, and that you understand it well enough to capture a share large enough to support the new venture. The entrepreneur can do this by addressing the following areas:

- Description of the industry
- Industry current size (# of firms, employment, aggregate sales)
- Growth potential
- Factors that affect the industry including:
 - seasonality,
 - technological and regulatory challenges
 - Supply and Distribution Characteristics
- Trends
- Barriers to entry

IV. The Target Market

(Review Chapter 7 – The Successful Business Plan)

This section of the plan assesses who the potential customer is. It can be businesses, individual or both. It could include the following:

Target Market Analysis

- Target Market Size
- Target Market Trends
- Demographics
- Psychographics
- Purchasing Patterns

V. The Competition

(Review Chapter 8 – The Successful Business Plan)

This section of the business plan assesses who the current players are in the industry and how you will compete with them. It gives you the opportunity to plan how you will enter the market and differentiate yourself from the current players. There are also risks or barriers to entering a market and this portion of the plan should explain how those risk and barriers are managed in your business.

Competitive Position

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

VI. Strategic Position & Risk Assessment Company Strengths

(Review Chapter 9 – The Successful Business Plan)

This section draws from analysis of the Industry, Target Market Analysis, and Competitive Analysis to form a Business Strategy. This section could include the following:

- Company Strengths
- Market/Industry Opportunities
- Risks Assessment/ Risk Evaluation
- Definition of Strategic Position
- SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)
-

Internal	Strengths	Weaknesses
External	Opportunities	Threats

VII. Marketing Plan and Sales Strategy

(Review Chapter 10 – The Successful Business Plan)

This section of the plan addresses how you will reach the target market with your message. The sales and marketing plan details what marketing activities the business will put in place to generate sales and lays out the cost associated with each activity. Remember, the purpose of marketing for a new business is to create awareness and drive sales. The sales and marketing plan should concisely explain how your business will achieve those goals. This section could include the following:

- Company Marketing Strategy
- Marketing Vehicles
- Strategic Partnerships
- Marketing Tactics and How They Create Sales
- Sales Force & Structure
- Sales Assumptions

VIII. Operations

(Review Chapter 11 – The Successful Business Plan)

This section should provide an overview of the strategy for the day-to-day implementation of the business model. The objective here is to demonstrate that you understand how the daily operations of the business will work. It's important to discuss technology needed to help manage processes. Also, this section will help you focus on relevant costs associated with implementing the plan. You must remember to incorporate the assumptions made in this section into the assumptions in the financial section of the Business Plan. Depending on the type of business, you should address the key areas listed below. (If the business is not manufacturing or producing a product some of these items may not apply, but even a service business should have a detailed plan of operations.) This section could include the following:

- Plant and Facilities
- Manufacturing/Production Plan
- Equipment and Technology
- Variable Labor Requirement
- Inventory Management
- Supply and Distribution
- Order Fulfillment and Customer Service
- Research and Development
- Capacity Utilization
- Quality Control
- Safety, Health, and Environmental Concerns
- Shrinkage
- Management Information Systems
- Other Operational Concerns

IX. Technology Plan (Optional)

(Review Chapter 12 – The Successful Business Plan)

X. Management and Organization

(Review Chapter 13 – The Successful Business Plan)

The strength of the management team plays a key role in investors' and lenders' decision to fund a venture. The objective of this section is to convince the reader that you have a management team that can effectively manage the product/service into the market place and make the venture a success. The key points you may want to cover include:

- Principals/Key Employees inclusive of
 - Title
 - Primary Responsibilities
 - Background, Relevant Work Experience and Expertise
 - Education

- Organizational Chart
- Board of Directors/Advisors
- Consultants/Specialists
- Management to Be Added
- Management Style/Corporate Culture

Someone identified with the responsibility of covering the following:

- Strategy
- Marketing
- Sales
- Operations
- Finance

XI. Development, Milestones & Exit Plan

(Review Chapter 15 – The Successful Business Plan)

What steps have you completed and what steps need to be occur for you to launch and grow your business. One can include a gant chart.

The growth and exit strategy outlines methods that will take the business through each stage of development. When a company gets to a certain point the owners may look at removing themselves from the operation. The exit strategy details two things: first, the owner's(s') participation or lack of participation in the business at some future point in time; and second, how any and all investors who are involved in the business are repaid i.e. do you sell the company and pay them off? How will it happen? The key points you may want to cover include:

- Past and Future Milestones
- Long-Term Company Goals
- Growth Strategy
- Exit Plan

Milestones Chart

Milestone	Start Date	End Date	Budget	Manager	Department
Develop Business Plan	10/1/2017	6/07/2018		CEO	Executive

XII. The Financials

(Review Chapter 16 – The Successful Business Plan)

The purpose of the financial section of the plan is to convince the reader that the venture makes sense from a financial standpoint. You must be able to translate the idea into a plausible set of financial projections which address procurement, allocation, return on investment, and cash management.

Required statements include:

- Start Up Cost
- Business Plan Assumptions
- Balance Sheet 3-Year Summary
- Income Statement 3-Year Summary
- Statement of Cash Flows 3-Year Summary

- Income Statement Monthly (Years 1-2), Quarterly (Year 3)
- Statement of Cash Flows Monthly (Years 1-2), Quarterly (Year 3)

- Break-Even Analysis
- Proposed Sources & Use of Funds – How will you use the winnings in addition to any other sources of capital you may have.
- Notes to Financials with Assumptions

XIII. Appendix

(Review Chapter 17 – The Successful Business Plan)

Appendix Content Options

- Resumes of Key Managers
- Copies of Licenses
- Estimates for any startup costs
- Market Research Results
- Quotes or estimates
- Supplier information
- Letters of Intent from prospective customers
- Key Contracts
- Letters of Endorsements
- Copies of Leases
- Floor Plans
- Sample logo, advertising, brochures
- Legal Documents relevant to the business
- Photos and designs of products or location
- Intellectual Property – Patents, Copyrights, Trademarks
- Census/Demographic data