



Eagle Strategy Group

Strategy & Technology Consulting for Small and Medium Businesses

Business Plan Outline

Business Plans are not just for Startups.

The business plan is an organic document that changes and grows with an organization. It should never be thought of as a document to serve one purpose, secure financial backing, and then left to collect dust. Because the Business Plan puts the strategy and goals of a business in writing, it is the most important document for any startup AND existing company.

Each section of the Business Plan can be utilized by various people throughout the organization. For example an investor or manager will look at the Financial Plan section of the Business Plan to review the company's financial goals and milestones to monitor the success of the company. Or, one can look at the Marketing Plan 3 months, 6 months, 1 year, etc. after the Business Plan was written and determine how well the business has penetrated the target markets defined in the plan.

The following is a general outline of the business plans created by Eagle Strategy Group:

Introduction (1 Page)

- ✦ One to Two Paragraph intro to venture and the funding required by the venture.
- ✦ Contact information.

Executive Summary (1 – 2 Pages)

- ✦ Summarize each section hitting the key points.
- ✦ HINTS: Write with a positive tone and include key terms and industry jargon that show an educated reader that you understand the business.

Industry Analysis

- ✦ Background on the industry keying on the areas that your venture will address.
- ✦ Future outlook and trends in the industry as well as an analysis of competition and industry numbers
- ✦ A high level description of the market segmentation.

Description of Venture

- ✦ Products and/or Services.
- ✦ Size of Business
- ✦ Any general requirements that are important to the business such as office space, fixtures, computers, software, etc

Production Plan

- ✦ How the company will produce product or perform the service.
- ✦ Key processes, costs and any facility needs including machinery & equipment.

Marketing Plan

- ✦ Pricing, distribution, promotion, product forecasts, etc.
- ✦ Elaborate on the market segmentation that was introduced at a high level in the Industry Analysis.

Assessment of Risk

- ✦ I have not used this section in any recent plans, but instead have been addressing risk in the sections where they need to be addressed. For example if the client's industry is experiencing a period of stagnate sales, I would address this in the Industry analysis and then point out how it will be overcome



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Business Plan Outline (Continued)

in the marketing plan. I keep the section in the outline because even if it is not present, it is something that needs to be addressed, because a knowledgeable reader is going to know that the industry is stagnate and will want to see that you know this and are addressing.

- ✦ I have also replaced this section with a SWOT analysis of the venture in some plans.

Organization Plan

- ✦ Legal structure of the venture (LLC, Partnership, C-Corp, etc.)
- ✦ List the owners and what % or how many shares do they own as well as the board of directors.
- ✦ Organization Chart with names and titles followed by one paragraph each on the person filling the role. If the position is open include a paragraph on the characteristics you are looking for in someone to fill the role.
- ✦ In the appendix include resumes for all people listed in this section.

Financial Plan

- ✦ One to two pages of highlights and assumptions.
- ✦ Pro Forma Financials for 3 years highlighting key figures.
- ✦ In the appendix or as a separate exhibit have Balance Sheet, Income Statement, and Cash Flow for first year by month and second and third year by quarter.

Eagle Strategy Group provides Strategy Consulting Services to small and medium sized businesses. We specialize in developing strategic solutions in Operations, Information Technology (IT), Startup, and Merger and Acquisitions (M&A), as well as provide interim management support. To continue to provide clients with world class solutions, Eagle has recently added an Active Mentoring Program (AMP) for Startups. AMP for Startups is designed to train entrepreneurs how to write a business plan and then support them in every step of the business startup process.

Startups and companies in need of a strategic reorganization have found Eagle Strategy Group to be a strong partner with the ability to quickly complete Business Plans and execute other strategic projects. Our experience launching and reorganizing businesses and contacts in the private equity and banking communities will accelerate your time to market. The faster your company can go to market or reorganize and start positive cash flow the less capital is needed and the more you can concentrate on your core business instead of where the money will come from.

For more information on how Eagle Strategy Group can improve your financial performance visit www.eaglestrategygroup.com or contact:

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