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Lean Business Plan

[Insert Legal Business Name]

[Business LOGO]

Date:

Prepared by:

Address:

Phone Number:

Email Address:

Website:

Table of Contents

Company Profile / Business Description	2
Company History	2
Customers.....	2
Marketing & Sales.....	3
Industry.....	3
Objectives & Action Plan	3
Operations	4
Financials	4
Templates	5
Marketing Activities.....	5
Objectives & Action Plan	5

Company Profile / Business Description

- What is your registered business name?
- What is the business structure (sole proprietorship, partnership, or corporation)?
 - Who are the owners? / What is the ownership breakdown?
- Where is the business located and what is the address (if online only, what is the website)?
 - Do you own or rent the space?
 - Why did you choose this location?
- What do you provide to your customers (what do you sell / offer)?
 - What are your products and / or services, and which ones cater to which customers?
 - What is your unique selling proposition?
 - What does your brand represent?
- What is the status of the business: When did the business open / is it opening?
- What is your Mission Statement: what is the purpose of the business?
- What is your Vision Statement: what is your long-term goal for the business?

Company History

- Why did you start the business?
 - What problem did you see an opportunity to solve?
 - Where did you get the idea?
- Who are you?
 - How does your passion, experience, education, and skills relate to the business?

Customers

- Who is your target market (your best customer)?
- Is your business selling to a customer (B2C) or a business selling to another business (B2B)?
- B2C:
 - What are their demographics (age, gender, ethnicity, income, marital status, family, education, occupation, etc.)?

- What are their lifestyle and psychographics (interests, hobbies, values, personality, attributes, etc.)?
- B2B:
 - What is its industry, size (employees, profits, budget), organizational structure, decision maker?
- What is your local market (what geographical region are you selling to)?
 - How many of your target market customers are in this area?

Marketing & Sales

- What are your top three marketing activities to reach and sell to your best customers?
 - How will you implement these action-driven activities and know if they are working?
 - Answer: How, where, when, how often, budget, expected results
 - *Consider completing the Marketing Activities table at the end of this document
- What are your support tools to help these activities? (ex. Business cards, website, etc.)

Industry

- What industry is the business in?
 - What is the history and projected future of this industry?
- Are there any regulations or licenses you need to be in this industry?
- Who are your top competitors? What are their strengths and weaknesses?

Competitor	Strengths	Weaknesses

- Why are you different from the competition?

Objectives & Action Plan

- What milestones do you want to reach in the future and when do you want to achieve them by?
 - *Consider completing the Objectives & Action Plan table at the end of this document

Operations

- Where do customers buy from you (in store, online, mobile, salesperson)?
- When are you open to sell (what are your hours and days of operation)?
- Do you currently pay employees or contractors? What roles? How many?
 - Do you plan to hire or contract workers in the future? What roles? How many?
- Do you have / have you satisfied needs for insurance, zoning, by-laws, agreements, etc.?
- Who are your suppliers, partners, and professional advisors?
- Are there any identified risks you should be prepared for?

Financials

- What are your start-up costs (or expansion costs)?
 - What are your funding sources: where did you get the money to start your business?
 - If you are asking for money from an investor / a grant / etc., what will you use the money for?
- What prices are you selling your offerings for?
- What are your expected sales (monthly / yearly)?
 - Are there any fluctuations in sales because of marketing activities or seasonality?
 - Include your Sales Forecast
- What is the cost of goods sold (COGS) of your offerings?
- What are your expected operational expenses?
 - Include your Cash Flow Statement
- What are your sales to date (if applicable)?
- What are your expected profits (year one and year two)?

