BUSINESS PLAN OUTLINE FROM WIS DEPT OF COMMERCE
Early Planning Grant application
(Modified 10-3-12)

COVER SHEET (1 page)
  Company Name
  Contact Information
  Confidentiality

EXECUTIVE SUMMARY (1 - 2 pages)

DESCRIPTION OF THE COMPANY
  History
  Key Management and Roles
  Target Customers

PRODUCT OR SERVICE (4 – 6 pages)
  Description
  Technology involved (1 page, can have appendix re technology)
  Proprietary Features (emphasize)
  Competitive advantages/disadvantages
  Intellectual Property: Trademark, Patent, Copyright Issues

MARKET (8 – 12 pages)
  Size and Trends
  Potential Customers (market research done-primary, secondary)
  Competitors, Barriers to Entry
  Marketing Strategy: Product, Pricing, Promotion, Place (4 P’s)
  Estimated Market Share

MANAGEMENT AND OWNERSHIP (1 – 2 pages)
  Management, Personnel, Job Descriptions, Resumes
  List of Stockholders by Ownership (upon request)
  List of Board Members (board of directors, board of advisers)
  Professional Services Providers

PRODUCTION AND OPERATIONS (4 – 6 pages)
  Location Advantages and Disadvantages
  Personnel Requirements
  Facility and Equipment Requirements
  Production Process
  Inventory, Shipping

OTHER (Don’t use this category name)
  Strategic Plan Objectives (under Description of the Company)
  Timetables (generally in Production and Operations)
  Risk Factors and Planned Responses (generally addressed throughout plan)
  Legal and Tax Issues (generally in Management and Ownership)
FINANCIAL INFORMATION (3 - 4 pages, detail in appendices)

- Budget
- Sources and Uses of Funds (loans, equity, grants)
- Historical Financial Statements - balance sheets, income statements, cash flow statements (annually for 3 years – not relevant for a new business)
- Projected Financial Statements: balance sheets, income statements, cash flow statements (annually for 3 years with a monthly breakout for the first twelve months)
- Details of Assumptions Used for Projected Financial Statements

EXHIBITS (Optional, include only if referenced in the plan)

- Pictures of Product(s), Advertising, Promotional and News Information
- Market Analyses
- Articles from Trade Journals
- Significant Contract Agreements
- Resumes of Managers, Key Personnel
- Historical Financial Statements
- Projected Financial Statements and Key Assumptions