****

**Lean Business Plan**

**[Insert Legal Business Name]**

**[Business LOGO]**

Date:

Prepared by:

Address:

Phone Number:

Email Address:

Website:

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## 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?

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| --- | --- | --- |
| **Competitor** | **Strengths** | **Weaknesses** |
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* + 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)?

## Templates

### Marketing Activities

* How will you implement the action-driven marketing activities and know if they are working?
  + Answer: How, where, when, how often, budget, expected results

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Type (how)** | **Where** | **Target Market** | **Cost per Activity** | **When & Frequency** | | | | | | | | | | | | **Total # Activities** | **Total Cost $$** | **Expected Results** |
| **Jan** | **Feb** | **Mar** | **Apr** | **May** | **Jun** | **Jul** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** |
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### 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

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| --- | --- | --- | --- |
| **Overall Objective** | **Actions (to do)** | **Due Date** | **Done** |
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