**Small Business Planner Template**

**SMALL BUSINESS PLAN**

COMPANY NAME

DATE PREPARED

00/00/0000

CONTACT

Contact Name

Contact Email Address

Phone Number

Street Address

City, State and Zip

webaddress.com

**TABLE OF CONTENTS**

[EXECUTIVE SUMMARY 3](#_Toc36722900)

[COMPANY OVERVIEW 3](#_Toc36722901)

[PROBLEM & SOLUTION 3](#_Toc36722902)

[THE PROBLEM 3](#_Toc36722903)

[OUR SOLUTION 3](#_Toc36722904)

[TARGET MARKET 3](#_Toc36722905)

[MARKET SIZE & SEGMENTS 3](#_Toc36722906)

[COMPETITION 3](#_Toc36722907)

[CURRENT ALTERNATIVES TARGET BUYERS ARE USING 3](#_Toc36722908)

[OUR COMPETITIVE ADVANTAGES 3](#_Toc36722909)

[PRODUCT OR SERVICE OFFERINGS 3](#_Toc36722910)

[PRODUCT OR SERVICE 3](#_Toc36722911)

[MARKETING 3](#_Toc36722912)

[MARKETING PLAN 3](#_Toc36722913)

[TIMELINE & METRICS 3](#_Toc36722914)

[TIMELINE 3](#_Toc36722915)

[MILESTONES 3](#_Toc36722916)

[KEY PERFORMANCE METRICS 3](#_Toc36722917)

[FINANCIAL FORECASTS 3](#_Toc36722918)

[KEY ASSUMPTIONS 3](#_Toc36722919)

[FINANCING 3](#_Toc36722920)

[SOURCES OF FUNDING 3](#_Toc36722921)

[USE OF FUNDING 3](#_Toc36722922)

# EXECUTIVE SUMMARY

|  |
| --- |
| Write this section last and summarize all the key points in your business plan in less than two pages. This is your opportunity to capture the attention of your reader and gain buy-in.  |

# COMPANY overview

|  |
| --- |
| Provide a description of the overall nature of your business and the industry in which it operates. Include details like industry trends, demographics, and governmental and economic influences. |

# problem & solution

## THE PROBLEM

|  |
| --- |
|  |

## OUR SOLUTION

|  |
| --- |
|  |

# TARGET MARKET

## MARKET SIZE & SEGMENTS

|  |
| --- |
|  |

# COMPETITION

## CURRENT ALTERNATIVES TARGET BUYERS ARE USING

|  |
| --- |
|  |

## OUR COMPETITIVE ADVANTAGES

|  |
| --- |
|  |

# PRODUCT OR SERVICE OFFERINGS

## PRODUCT OR SERVICE

|  |
| --- |
| Describe the product or service you are offering, how it benefits the buyer, and its unique selling proposition. |

# marketing

## MARKETING PLAN

|  |
| --- |
| Describe your marketing objectives and strategy here, including your costs, goals, and plan of action. |

# timeline & METRICS

## TIMELINE

|  |  |  |
| --- | --- | --- |
| **ACTIVITY** | **DESCRIPTION** | **COMPLETION DATE** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## MILESTONES

|  |  |  |
| --- | --- | --- |
| **MILESTONE** | **DESCRIPTION** | **COMPLETION DATE** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## KEY PERFORMANCE METRICS

|  |  |  |
| --- | --- | --- |
| **ACTIVITY** | **DESCRIPTION** | **KEY METRIC** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# FINANCIAL FORECASTS

## KEY ASSUMPTIONS

|  |
| --- |
| Provide insight into how you came up with the values in your financial projections (e.g., past performance, market research). Describe the growth you are assuming and the profit you anticipate generating. |

# FINANCING

## SOURCES OF FUNDING

|  |
| --- |
|  |

## USE OF FUNDING

|  |
| --- |
|  |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |