**Strategic Business Plan Template**

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| EXECUTIVE SUMMARY |  |  |  |
| **CONCISE OVERVIEW**  |  |
| YOUR COMPANY |
| **MISSION STATEMENT** |  |
| **GUIDING PRINCIPLES** |  |
| **PAST TRAJECTORY & RESULTS** |  |
| **MANAGEMENT CONSTRUCT** |  |
| **VALUE PROPOSITION** |  |

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| PRODUCT / SERVICE DEVELOPMENT |
| **PRODUCT / SERVICE DESCRIPTION** |  |
| **PRICING MODEL** |  |
| **DELIVERY SYSTEM** |  |
| **DELIVERY CAPABILITIES** |  |
| **CRITICAL ELEMENT SUPPLIERS** |  |

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| MARKET RESEARCH |
| **CLIENTS** |  |
| **COMPETITION** |  |
| **MARKET STATUS** |  |

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| MEASURABLE MARKETING GOALS |
| **CONSUMER CLIMATE** |  |
| **MARKET SHARE** |  |
| **DISTRIBUTION CHANNELS** |  |
| **DIVERSIFICATION** |  |

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| MARKETING PLAN |
| **STRATEGY / TACTICS** |  |
| **CLIENT BREAKDOWN** |  |
| **MARKET POSITIONING** |  |
| **ADVERTISING** |  |
| **PUBLIC RELATIONS** |  |
| **CROSS-SELLING CLIENT POSSIBILITIES** |  |
| **TEST MARKETING** |  |
| **OTHER** |  |

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| SITUATIONAL ANALYSIS (SWOT) |
| **INTERNAL FACTORS** | **STRENGTHS ( + )** |   | **INTERNAL FACTORS** | **WEAKNESSES ( – )** |
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| **EXTERNAL FACTORS** | **OPPORTUNITIES ( + )** |  | **EXTERNAL FACTORS** | **THREATS ( – )** |
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| FINANCIAL PLAN |
| **REVENUE SOURCES** |  |
| **FINANCIAL PROJECTIONS** |  |
| **PRO FORMA FINANCIAL STATEMENTS** |  |
| **MONTHLY CASH FLOW BUDGET** |  |
| **CRITICAL RATIOS / FINANCIAL STATEMENT ANALYSIS** |  |
| **BUDGET VARIANCE ANALYSIS** |  |
| **FINANCIAL REVIEWS & AUDITS** |  |

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| OVERALL ASSESSMENT AND REVIEW |
| **TRACKING SYSTEMS** |  |
| **CAMPAIGN BREAK-EVEN ANALYSIS** |  |
| **CLIENT SURVEYS** |  |
| **ASSOCIATE / ADVISORY BOARD INPUT** |  |
| **MARKET SHARE ANALYSIS** |  |
| **MARKET SURVEY** |  |
| **OTHER** |  |

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| RISK FACTORS (SEE SWOT) AND CONTINGENCIES |
| **REVENUE SHORTFALL** |  |
| **NEGATIVE LEGISLATION** |  |
| **ECONOMIC CLIMATE** |  |
| **COMPETITION** |  |
| **TECHNOLOGY** |  |
| **ADVERSE PUBLIC IMAGE** |  |

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| APPENDICES |
| **MARKET RESEARCH STUDY: CLIENTS** |  |
| **MARKET RESEARCH STUDY: COMPETITION** |  |
| **MARKET RESEARCH STUDY: ENVIRONMENT** |  |
| **KEY INFO SOURCES** |  |

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