WrittenSuccess

Creating a Business Plan

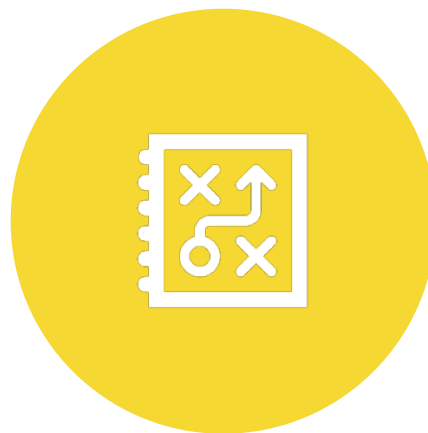That Brings Real Value

PART 3

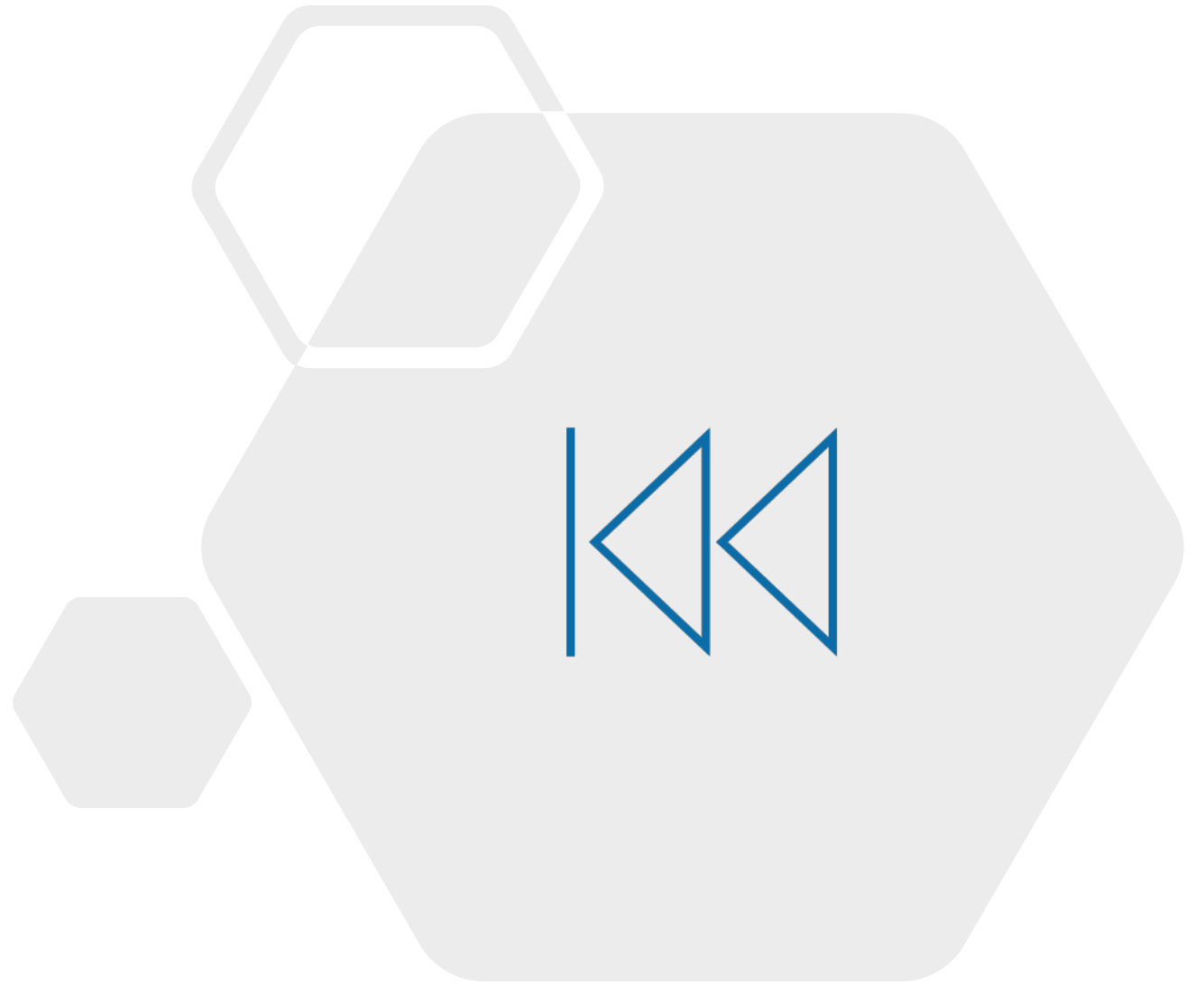# Agenda

RECAP PARTS 1&2

EXECUTIVE SUMMARY

SAY/DON'T SAY

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Part 1: Recap

Part 1: Business Plan Basics

1st Step: Goal Clarity

10 Core Sections

Templates & Funding

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Part 2:
Using Strategy

Strategy over ego/gut

"Why" for every decision

Future factors considered

HOW MANY "NO"S?

Executive Summary

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- 1 Page
- Attention Grabbing
- Key Information

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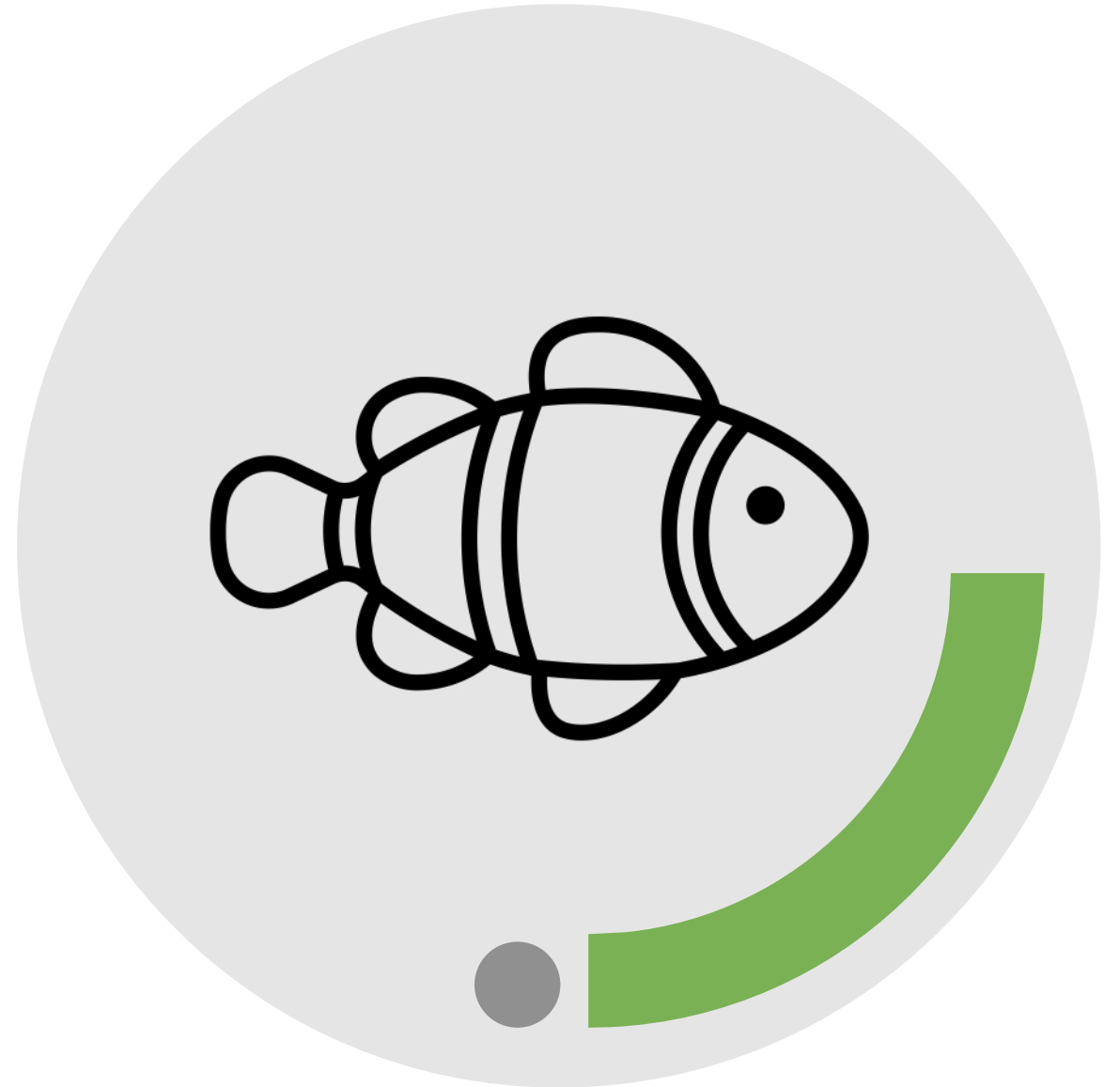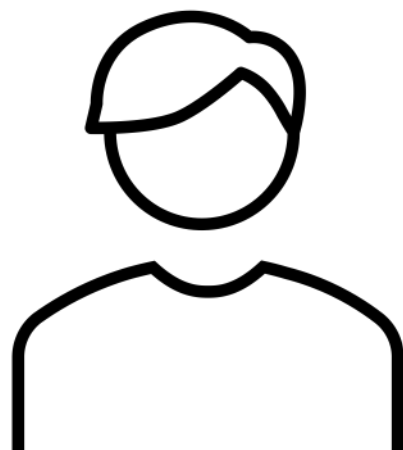
9 Seconds

TIME magazine in 2015 quoted research from Microsoft Corp

7 seconds

1. Company Name

2. Team Owners

3. Market Gap

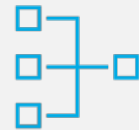4. How We Close the Gap

5. Projections

6. Use of Capital

7. Business Status

8. Equity Distributions

9. Niche

10. Target Customers

USE THE RIGHT FORMAT

KEY MESSAGING IN >30 SECONDS

3 X 3

Industry

Opportunity

Plan & Capital

Executive Summary

{Business name} is a new/existing business in city, state that offers product / service. The business operates under entity name Entity Name, LLC. The business is owned by {owner name} is partnering for the next phase of business expansion.

Industry

The business operates in the space {that has many competitors for sit down dining}. [business] targets [customers] looking to [action]. The business does not target [high-end dining].

Opportunity

[Business] is currently the only [offering specialty]. The business owners see opportunity to start operating within zip code 12345. Currently, there are 3 direct competitors identified in this area who will be challenged by this business on quality and atmosphere.

Plan and Capital

The business is launching and needs funds to [capital purpose]. The business is seeking $xxxxxxx to [purpose and plan].

PROJECTIONS	YEAR 1	YEAR 2	YEAR 3
REVENUES			
COSTS			

The Ask:
Seeking $

The Need:
Capital will be used to

Business Status:
Established 201
Post-Revenue

Equity:
[Owner names]
100% owners

Industry:
Food

Niche:
American Fast Dining

Customers:
Families making $35-$60K per year

1. Company Name

2. Team Owners

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4. How We Close the Gap

5. Projections

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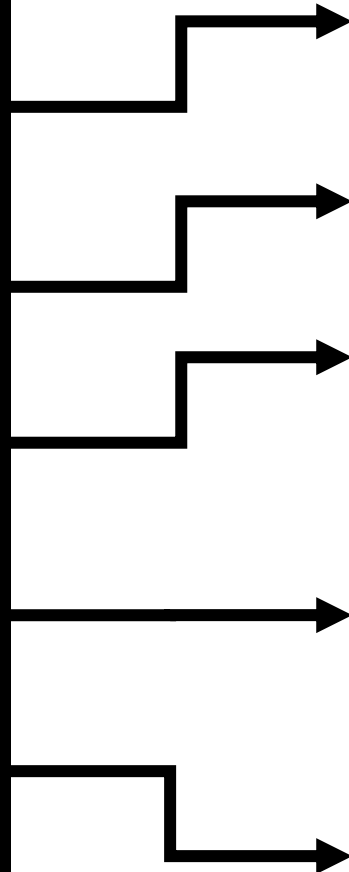**Customers:**
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Say/Don't Say

Writing Prompts

In one sentence or phrase, who is your target market?

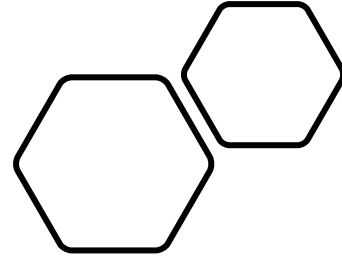What's the specific result someone will get from using your product or service?

Why does your target client want / care about this result? What does it change in his/her life?

What's the biggest pain point or frustration that your client has?

Sell the Plan, Not the Possibilities

% of industry capture

A million ways to …

"Competitors do not exist"

"Viral" / dominate

"Our sales targets are"

"Our chosen method is"

"Our offer is unique"

"Proof of market demand"

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