



# Business Plan Template

## Instructions

© 2009-2011 GreatBusinessPlans.Com  
<http://www.greatbusinessplans.com>

© 2010 GreatBusinessPlans.com a Division of Allied Focus, LLC

All Rights Reserved. This document may not be reproduced or redistributed in any format.

Permitted Use: Individuals who purchase this product are authorized to create a customized business plan or plans for a business of their own. This product may not be used by consultants to create business plans for others without the express written consent of GreatBusinessPlans.com.

## The Business Plan Template from GreatBusinessPlans.com

Many entrepreneurs know more about operating the type of business they are planning to start than they do about writing a business plan. Others have an idea of what should go into the plan, but writing is not their strong suit. Still others just need to get it done fast. Whatever your situation is, the Business Plan Template from GreatBusinessPlans.com will accelerate the process of helping you to create your business plan.

Before you begin, take just a few minutes to read through these instructions and you'll learn the fastest, easiest way to create your business plan.

### How to Create Your Business Plan.

Throughout this document you'll see several types of instructions designed to help you quickly customize the provided template to create your business plan. There are several different types of instructions. Each type of instruction is explained below.

- [Fill-in-the-blank] Replace the information in the brackets with the specific information about your business that is requested or described in the brackets.
- [Choose One, Option X] In many cases you will see two or more alternative sentences or paragraphs. Choose the one that best fits your business, customize it, and delete the others.
- [Optional] Items following this tag can be omitted from your business plan if they do not seem appropriate for your business.

### Two ways to get extra help.

In addition to the easy-to-use fill-in-the-blank format, two additional ways to ensure that you have exactly what you need are included to complete your customized business plan. Each is shown below.

#### Read and Delete

Instructional information appears in tan boxes just like this, with "Read and Delete" shown at the top. After following the instructions, you can delete each box before you finalize your plan. To delete this type of box, just click on the border to select it, then press delete.

#### More on the Web

For each section in this document, there is a link to a specific page on the GreatBusinessPlans.com website that provides more information about that particular section of your business plan. Whether you just need a little help, or want to customize your business plan beyond what is included here, the information on the website will guide you.

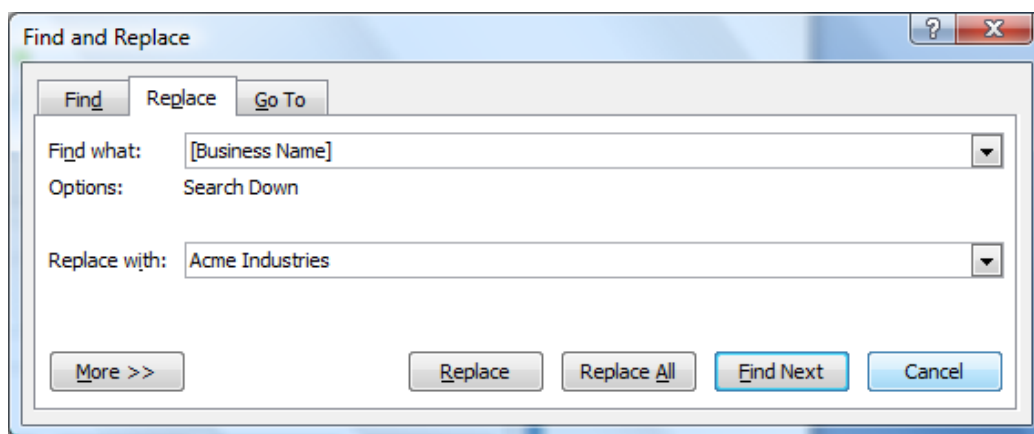
## From Start to Finish in Six Steps

Follow the steps below to completely customize your business plan in the fastest time possible. Open the *Business Plan Template* in Microsoft Word and follow the instructions below.

### Step 1: Insert Your Business Name

The name of your business will be used throughout the business plan. When you first open this document, you'll see [Business Name] every place you are to insert your actual business name. You could manually enter your company name in each place. To save time, let Microsoft Word do the work for you using Find and Replace.

Follow these easy steps to insert your company name throughout the document:



- With the document open in Microsoft Word, press Ctrl-F to display the Find and Replace dialog box shown above.
- Click the Replace Tab at the top of the dialog box.
- In the "Find what:" text box, enter [Business Name] including the brackets (this is what will be replaced). Be sure to include the brackets, which are usually found to the right of the letter P on your keyboard.
- In the "Replace with" text area, enter your company name exactly as you want it to show in the business plan,
- Click Replace All.

Your business name will now be used throughout the document.

### Step 2: Customize Your Business Plan

Before you begin, read through the table of contents to get a sense of how your business plan will be organized. Then, go through the business plan from top to bottom customizing each section using the instructions provided. Some parts you can fill in very quickly with a word or phrase. Other parts will require careful consideration or even some research. We'll guide you every step of the way.

### **Step 3: Create Your Financial Statements with the Excel Tool**

Sample tables in the *Key Financial Information* section show the formats for each of the financial statements expected to be included in your plan. You can complete these manually, or use the separate Excel tool that came with this product (Automated Business Plan Financials Excel file). The powerful Excel tool, just like the Word document, asks you to "fill in the blanks" and then creates the financial statements for you!

#### **Before Using the Excel Tool**

Here are a few important things you should know before using the Excel tool to create your financial forecasts:

- Additional instructions are provided in the Excel file itself.
- Use of the Excel tool requires that you have Microsoft Excel 2003 or newer.
- Basic Excel skills are required for entering data. You will not have to create any formulas.
- Detailed information about your anticipated expenses and revenue are important and will be required to successfully use this tool.
- Many people work with their accountant or another advisor to prepare or review their financial statements using the Excel tool.

#### **After Using the Excel Tool**

Review your financial statements carefully—they are your financial forecasts.

- If you're not familiar with financial statements, review your financial statements with a trusted advisor. Remember that the Excel file is just a tool for automating the calculations and formatting of your financial forecasts. It is important that you review your results with individuals who can validate your assumptions and expectations.
- Check the *Three Year Income Statement* to ensure that information you provided indicates that your business can be profitable. If not, consider what you can change about your plan and update the information about your assumptions on the *Fill in the Blank* tab.
- Review your Cash Flow forecast. Does your business plan indicate that you will run out of money? Or, is there enough cash at all times to sustain the business? If your Cash Flow statement shows the business running out of money, you'll need to increase your revenue, reduce your expenses, or increase the amount of funding for your business.

#### **Insert your Printed Forecasts and Optional Charts into Your Business Plan**

The Master Document includes blank tables where each of the financial forecasts is to be inserted. You can cut and paste the completed financials, and optionally the charts, from the Excel workbook into your Word document. Or, print the forecasts from Excel and insert them into your printed business plan.

## Step 4: Final Clean Up

After you've completed each section of your business plan, read through the entire document. Cleanup your document to ensure that all of the instructions are removed and that it reads properly. Be sure to delete the following items:

- All of the tan "Read More" boxes
- All of the blue "More on the Web" boxes
- Any [Brackets] that remain

The color-filled "Read More" and "More on the Web" boxes stand out rather easily. Simply click on the border to select a box and then press the delete key.

The best way to find any remaining instructions that should be removed is to let Microsoft Word find them for you. Search for the " [ " and " ]" characters that surround all of the instructions in the Master Document. Here's how:

- Press Ctrl-F (for find) and search for the left bracket character, " [ ". The bracket characters are found next to the letter P on most keyboards.
- Delete the bracket and any remaining instructional information.
- Repeat the steps above, this time searching for the right bracket character, " ] ".

## Step 5: Update the Table of Contents

When your plan is in its final form, look through the Table of Contents (TOC) and update the page numbers. If you decided not to include any sections in your final business plan, remove those sections from the TOC as well.

You can update the TOC automatically by right-clicking anywhere in the TOC and choosing Update Field. When prompted, choose Update Entire table. Sometimes the automatic TOC feature becomes disabled when your business plan is customized due to the special TOC formatting characters being deleted. If that's the case, you can manually update the page numbers in just a few minutes time.

## Step 6: Proof-Read Your Finished Business Plan

Save your completed business plan. Take a break and review it from top to bottom with a fresh mind. It's always a good idea to have someone else review your business plan from start to finish as well.

**Congratulations!** If you've followed the steps above, you're business plan is complete.