

BUSINESS PLAN



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Your business plan is divided into the following sections:

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2 Sales & Marketing Plan

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3 Operating Plan

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6 Executive Summary

A brief description of the project, the financing required, and additional information that help explain the business plan	8
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7 APPENDIX: Financial Plan

The company's financial performance, both historical and projected includes sales, cost of goods sold, expenses, income statement, balance sheet, cash flow budget, financial requirements, performance indicators, and personal status.



LEGAL NAME ▶

TRADING
NAME ▶

BUSINESS
ADDRESS ▶

PHONE ▶ FAX ▶

E-MAIL ▶

DESCRIPTION OF
THE BUSINESS ▶

MAJOR
DEMOGRAPHIC,
ECONOMIC, SOCIAL
AND CULTURAL
FACTORS ▶

MAJOR PLAYERS
(suppliers, distributors,
clients) ▶

NATURE OF THE
INDUSTRY ▶

TRENDS IN
THE INDUSTRY ▶

GOVERNMENT
REGULATIONS ▶



THE MARKET

MARKET
SEGMENT ▶

PRODUCTS
& SERVICES ▶

PRICING AND
DISTRIBUTION ▶

MARKET TRENDS ▶

IMPLICATIONS
OR
RISK FACTORS ▶

PLANNED
RESPONSE ▶

COMPETITION

COMPETITORS
AND TYPE OF
COMPETITION ▶

COMPETITORS'
STRENGTHS AND
WEAKNESSES ▶

COMPETITIVE
ADVANTAGE ▶

BUSINESS PLAN

Section 2 Sales and Marketing Plan



CUSTOMERS ▶

NAME/ADDRESS

TERMS

PRODUCT/SERVICE

1

2

3

4

▼ ADDITIONAL INFORMATION

SUPPLIERS ▶

NAME/ADDRESS

TERMS

PRODUCT/SERVICE

1

2

3

4

5

▼ ADDITIONAL INFORMATION

ADVERTISING
& PROMOTION ▶

PRICING
& DISTRIBUTION ▶

CUSTOMER
SERVICE POLICY ▶



LOCATION ▶

▼ SIZE AND CAPACITY

▼ ADVANTAGES OR DISADVANTAGES

▼ LEASE OR OWNERSHIP DETAILS

EQUIPMENT,
FURNITURE &
FIXTURES ▶

FUTURE
EXPENDITURES /
TECHNOLOGY
REQUIREMENTS ▶

RESEARCH AND
DEVELOPMENT ▶

ENVIRONMENTAL
COMPLIANCE ▶

ADDITIONAL
INFORMATION ▶



BUSINESS PLAN

Section 4 Human Resources Plan

KEY EMPLOYEES	NAME OR TITLE (N° OF POSITIONS)	KEY RESPONSIBILITIES	QUALIFICATIONS
1			
2			
3			
4			
▼ ADDITIONAL INFORMATION			

POLICIES & PROCEDURES

HOURS OF OPERATIONS	
NUMBER OF EMPLOYEES	
VACATION PROGRAM	
PERFORMANCE ASSESSMENT	
TRAINING & DEVELOPMENT	
REMUNERATION AND BENEFITS	



ACTION PLAN ▶	ACTION	BY WHEN
	1	
	2	
	3	
	4	
	5	
	6	
	7	

▼ ADDITIONAL INFORMATION



OBJECTIVES /
DESCRIPTION OF
THE PROJECT ▶

BUSINESS
HISTORY /
NATURE OF
OPERATIONS ▶

PRODUCTS AND
SERVICES ▶

PROJECT
FINANCING ▶

MANAGEMENT /
ADVISORS ▶ **Director 1**

Director 2

RISK
ASSESSMENT &
CONTINGENCY
PLAN ▶



FINANCIAL
INSTITUTION



SUPPORTING
DOCUMENTS





GLOSSARY

APPENDIX

FINANCIAL PLAN

GLOSSARY



Canadian Centre for Occupational Health and Safety