

# Appendix O

## Business Plan Outline

The following outline for a business plan details what information should be included under each category. Please note that all parts may not be applicable to every business. Similarly, there may be additional categories that should be included.

### Title Page

Business Name  
Purpose (Planning and/or Financing Proposal)  
Name of Principals  
Contact Information

### Executive Summary

Describes the purpose and/or goal of the business plan and summarizes the major points of the business plan. This summary should be one to two pages and should highlight the important facts that are described in detail within the plan.

### Table of Contents

List all of the headings within the plan and the pages they are located on.

### Description of Business

- Mission statement
- Type of business/industry
- Status of business (start-up/existing/expanding)
- Form of business (sole proprietor/partnership/corporation)
- Location (address)
- Physical features of building
- Own or lease facility
- Hours of operation/seasonal (peaks/valleys)
- Background and history
- Future goals/objectives/strategies
- Products/services (description/customer benefits)
- Target market

### Market

Company

Analysis

- Company goals/focus
- Company strengths/weaknesses
- Niche market

Product/Service

- Description of products/services
- Benefits to consumers
- Compare to competitors

Consumers

- Type of consumers (wholesale/retail)
- Products/services purchasing
- Factors affecting purchasing decisions (politics/economics/etc.)

Competition

- Primary competitors
- Competitors' products/services
- Evaluation of product/service (similar/dissimilar)

Marketing Plan

- Overall market description
- Size/growth and trends
- Market segments
- Market projections
- Products/service (brand name/quality/scope/package/warranty)
- Pricing (list price/discounts/payment terms)
- Distribution (channels/locations/logistics)
- Promotion (advertising/public relations/trade shows/partnerships)
- Sales force and forecast
- Market growth potential

### Management

Management team (include resumes)  
Business background/management experience  
Division of responsibilities of management team  
Strengths/weaknesses of team  
Salary and/or payment plan  
Benefit plan  
Outside management and/or assistant needs

### Personnel

Personnel needs  
Skills required  
Training requirements/availability  
Full-time/part-time  
Salary/hourly  
Benefits  
Employee policies/contracts

### Financial Data

List of capital equipment  
Source and application of start-up capital  
Inventory control system  
Accounting system  
Three years profit and loss statement (income and expenses)  
Three years balance sheet (assets, liabilities and owner equity)

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Cash flow (projected monthly breakdown of when money comes in and goes out, where money came from and what it was spent on)

Break-even analysis (level at which total revenues and total expenses equal; no profit/no loss)

Explanation of assumptions for all financial documents

Three years tax returns (company and principals)

### **Supporting Documents**

Contracts/leases/agreements

Copies of licenses/permits/certifications/etc.

Community support

Marketing research information

Credit reports

Principal current financial statements

Resumes

Tax returns

For an electronic fisheries business plan template, see Alaska Fish Business Plan Writer, available from Alaska Sea Grant's Fisheries Business Assistance Project ("FishBiz"). You can request a free CD from the Alaska Sea Grant MAP, or download the program by going to [www.alaskafishbiz.org](http://www.alaskafishbiz.org) and following the link to fisheries business management.