

THE
CEO MOM METHOD
FROM IDEA TO INCOME

**BUSINESS PLAN
TEMPLATE**

BUSINESS PLAN TEMPLATE

TURN YOUR BUSINESS IDEA INTO A PLAN WITH CLARITY,
CONFIDENCE, AND CEO-LEVEL STRUCTURE!

EXECUTIVE SUMMARY

(COMPLETE THIS SECTION LAST FOR CLARITY)

BUSINESS NAME: _____

FOUNDER: _____

START DATE: _____

EXECUTIVE SUMMARY:

(BRIEF OVERVIEW OF YOUR BUSINESS – WHAT
YOU DO, WHO YOU SERVE, AND WHAT MAKES YOU
DIFFERENT)

FACTSHEET:

LEGAL STRUCTURE: _____

INDUSTRY: _____

PRODUCTS/SERVICES: _____

TARGET MARKET: _____

HIGHLIGHTS:

(ANY EARLY WINS, UNIQUE VALUE, OR TRACTION YOU HAVE SO FAR)

OBJECTIVES

(SHORT & LONG-TERM GOALS):

VISION STATEMENT:

MISSION STATEMENT:

SALES & GROSS HIGHLIGHTS EXAMPLES

YEAR	SALES	GROSS MARGIN	NET PROFIT

DESCRIPTION OF BUSINESS

COMPANY OWNERSHIP/LEGAL ENTITY:
(SOLE PROPRIETORSHIP, LLC, PARTNERSHIP, ETC.)

LOCATION

(HOME-BASED, VIRTUAL, OR PHYSICAL ADDRESS):

INTERIOR

(DESCRIBE WORKSPACE OR CUSTOMER-FACING SETUP IF
APPLICABLE):

HOURS OF OPERATION:

***** BE SURE TO INCLUDE YOUR BUSINESSES PEAK SEASONS AND
SLOW SEASONS.*****

SUPPLIERS

(LIST VENDORS OR SERVICE PROVIDERS YOU'LL WORK WITH):

PRODUCTS/SERVICES:

EQUIPMENT NEEDED:

START-UP SUMMARY

(WHAT YOU NEED TO LAUNCH):

MANAGEMENT

(YOU, TEAM, ADVISORS, ETC.):

HUMAN RESOURCES

(CURRENT/FUTURE TEAM NEEDS):

MARKETING PLAN INDUSTRY ANALYSIS

(TRENDS AND SHIFTS IN YOUR NICHE):

TARGET MARKET OVERVIEW:

(WHO ARE YOU SERVING? WHAT DO THEY NEED?)

MARKET SEGMENTATION

(GROUPS OR PERSONAS):

COMPETITION

(WHO ELSE IS SERVING YOUR AUDIENCE?):

BUYING PATTERNS

(WHAT INFLUENCES YOUR CUSTOMERS TO BUY?):

PRICING STRATEGY:

(HOW WILL YOU PRICE AND WHY?)

APPENDIX

START-UP EXPENSES (USE THIS TO ESTIMATE YOUR BUDGET):

ITEM	COST ESTIMATE	NOTES
WEBSITE/DOMAIN	\$_____	
BRANDING/LOGO	\$_____	
EQUIPMENT/SUPPLIES	\$_____	
MARKETING/ADS	\$_____	
LEGAL/FEES	\$_____	
OTHER_____	\$_____	

➤ **TOTAL ESTIMATED START-UP COSTS: \$_____**

***PHOTO EXAMPLES** (MOOD BOARD OR WORKSPACE INSPIRATION):
(PASTE OR ATTACH PHOTOS OF YOUR BRANDING INSPIRATION,
WORKSPACE, OR PRODUCT EXAMPLES)