STACY'S THINGS

YOUR BUSINESS PLAN

A Step-by-Step Workbook

Prepared for:

Business Name:

Date:

How to Use This Workbook

This workbook walks you through every section of a standard business plan, one step at a time. Work through it in order — each section builds on the last. You don't need polished writing here; you just need honest, specific answers. Once complete, this becomes the foundation of the business plan you'd show a lender, investor, or partner.

- Answer every prompt in plain language — you can polish the wording later.
- If you don't know an answer yet, write your best guess and flag it to revisit.
- Aim to complete one section per sitting so the plan doesn't feel overwhelming.

💡 **Before you start**

Grab any numbers you already have handy — pricing ideas, startup costs, competitor names — so you're not searching for them mid-flow.

1. Executive Summary

Write this section LAST, even though it appears first. It's a one-page snapshot of your whole plan.

What does your business do, in one sentence?

What problem are you solving, and for whom?

What makes your business different from existing options?

What are your top 3 goals for the first 12 months?

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2. Business Description

Business name and legal structure

(Sole proprietorship, LLC, partnership, corporation — or 'not yet decided')

Mission statement

Why does this business exist, beyond making money?

Industry overview

What industry are you in, and is it growing, shrinking, or stable?

Business goals

Short-term (0–12 mo)

Mid-term (1–3 yrs)

Long-term (3–5 yrs)

3. Market Analysis

Target customer

Describe your ideal customer: demographics, needs, buying habits.

Market size

How many potential customers exist in your target area or niche?

Competitor snapshot

Competitor 1

Competitor 2

Competitor 3

Your competitive advantage

Why will customers choose you over the competitors above?

💡 **Quick tip**

If you can't name 2–3 real competitors, that's usually a sign to research the market more before launching.

4. Organization & Management

Ownership structure

Who owns the business, and in what percentages?

Management team

Who runs day-to-day operations? List key roles even if one person fills several.

Owner / CEO

Operations

Marketing / Sales

Finance

Advisors or gaps

Who do you turn to for advice? What skills are you still missing?

5. Products & Services

What are you selling?

List each product or service and a one-line description.

Pricing

Product/Service 1

Product/Service 2

Product/Service 3

What's your supply or delivery process?

How do you make, source, or deliver what you sell?

6. Marketing & Sales Strategy

How will customers find you?

- Channel 1:
- Channel 2:
- Channel 3:

Sales process

Walk through the steps from 'stranger' to 'paying customer.'

Marketing budget (monthly estimate)

7. Financial Plan

Startup costs

Equipment / supplies	
Licenses / legal fees	
Website / branding	
Initial inventory	
Marketing launch	
Other	
TOTAL	

Monthly operating expenses

Rent / utilities	
Payroll	
Software / tools	
Insurance	
Other	

Revenue projection (first year, rough estimate)

Units sold × price, or a simple monthly estimate.

Break-even point

At what point do you expect revenue to cover costs?

8. Funding Request (if applicable)

How much funding do you need?

How will funds be used?

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Funding source(s) you're pursuing

Savings, loan, investors, grants, crowdfunding...

9. Your Next Steps

List the 5 actions you'll take in the next 30 days to move this plan forward.

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💡 **You're not done — you're ready.**

A business plan is a living document. Revisit it every quarter and update it as you learn more about your market and customers.