

Company Name

Business plan

Mission Statement

Clearly state your company's long term mission. Try to use words that will help direct the growth of your company, but be as concise as possible.

Competition

- Summarize the competition.
- Outline your company's competitive advantage.

The Team

- List the key staff by name and position.
- Include previous accomplishments to show that these are people with a record of success.
- Summarize number of years of experience in this field.

Market Summary

- Summarize your market in the past, present, and future.
 - Review those changes in market share, leadership, players, market shifts, costs, pricing, or competition that provide the opportunity for your company's success.

Opportunities

- Identify problems and opportunities.
 - State consumer problems and define the nature of product/service opportunities that are created by those problems.

Business Concept

- Summarize the key UVP (Unique Value Proposition) on which your business is based.

Goals and Objectives

- List five-year goals
- State specific, measurable objectives for achieving your five-year goals.
 - List market-share objectives.
 - List revenue/profitability objectives.

Financial Plan

- Outline a high-level financial plan that defines your financial model and pricing assumptions (give us a shout for samples for both start-ups and existing brokerages).
 - This plan should include expected annual sales and profits for the next three years.
 - Use several slides to cover this material appropriately.

Resource Requirements

- List requirements for the following resources:
 - Personnel
 - Technology
 - Finances
 - Marketing
 - Promotion
 - Population (Recruiting and Retention)
 - Sales (especially how you are planning on how to make agents productive)

Risks and Rewards

- Summarize the risks of the proposed project and how they will be addressed.
- Estimate expected rewards, particularly if you are seeking funding.

Key Issues

- Near term
 - Identify key decisions and issues that need immediate or near-term resolution.
 - State consequences of decision postponement.
- Long term
 - Identify issues needing long-term resolution.
 - State consequences of decision postponement.
- If you are seeking funding, be specific about any issues that require financial resources for resolution.