

# Strategic Business Plan Template

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## EXECUTIVE SUMMARY

|                  |  |
|------------------|--|
| CONCISE OVERVIEW |  |
|------------------|--|

## YOUR COMPANY

|                           |  |
|---------------------------|--|
| MISSION STATEMENT         |  |
| GUIDING PRINCIPLES        |  |
| PAST TRAJECTORY & RESULTS |  |
| MANAGEMENT CONSTRUCT      |  |
| VALUE PROPOSITION         |  |

## PRODUCT / SERVICE DEVELOPMENT

|                               |  |
|-------------------------------|--|
| PRODUCT / SERVICE DESCRIPTION |  |
| PRICING MODEL                 |  |
| DELIVERY SYSTEM               |  |
| DELIVERY CAPABILITIES         |  |
| CRITICAL ELEMENT SUPPLIERS    |  |

## MARKET RESEARCH

|               |  |
|---------------|--|
| CLIENTS       |  |
| COMPETITION   |  |
| MARKET STATUS |  |

## MARKETING PLAN

|                                    |  |
|------------------------------------|--|
| STRATEGY / TACTICS                 |  |
| CLIENT BREAKDOWN                   |  |
| MARKET POSITIONING                 |  |
| ADVERTISING                        |  |
| PUBLIC RELATIONS                   |  |
| CROSS-SELLING CLIENT POSSIBILITIES |  |
| TEST MARKETING                     |  |
| OTHER                              |  |
| OTHER                              |  |

## MEASURABLE MARKETING GOALS

|                       |  |
|-----------------------|--|
| CONSUMER CLIMATE      |  |
| MARKET SHARE          |  |
| DISTRIBUTION CHANNELS |  |
| DIVERSIFICATION       |  |

## SITUATIONAL ANALYSIS (SWOT)

| INTERNAL FACTORS | STRENGTHS ( + ) |
|------------------|-----------------|
|                  |                 |
|                  |                 |
|                  |                 |
|                  |                 |
|                  |                 |

| INTERNAL FACTORS | WEAKNESSES ( - ) |
|------------------|------------------|
|                  |                  |
|                  |                  |
|                  |                  |
|                  |                  |
|                  |                  |

| EXTERNAL FACTORS | OPPORTUNITIES ( + ) |
|------------------|---------------------|
|                  |                     |
|                  |                     |
|                  |                     |
|                  |                     |
|                  |                     |

| EXTERNAL FACTORS | THREATS ( - ) |
|------------------|---------------|
|                  |               |
|                  |               |
|                  |               |
|                  |               |
|                  |               |

## FINANCIAL PLAN

|  |  |
|--|--|
| REVENUE SOURCES                                |  |
| FINANCIAL PROJECTIONS                          |  |
| PRO FORMA FINANCIAL STATEMENTS                 |  |
| MONTHLY CASH FLOW BUDGET                       |  |
| CRITICAL RATIOS / FINANCIAL STATEMENT ANALYSIS |  |
| BUDGET VARIANCE ANALYSIS                       |  |
| FINANCIAL REVIEWS & AUDITS                     |  |

## OVERALL ASSESSMENT AND REVIEW

|                                  |  |
|----------------------------------|--|
| TRACKING SYSTEMS                 |  |
| CAMPAIGN BREAK-EVEN ANALYSIS     |  |
| CLIENT SURVEYS                   |  |
| ASSOCIATE / ADVISORY BOARD INPUT |  |
| MARKET SHARE ANALYSIS            |  |
| MARKET SURVEY                    |  |
| OTHER                            |  |

## RISK FACTORS (SEE SWOT) AND CONTINGENCIES

|                      |  |
|----------------------|--|
| REVENUE SHORTFALL    |  |
| NEGATIVE LEGISLATION |  |
| ECONOMIC CLIMATE     |  |
| COMPETITION          |  |
| TECHNOLOGY           |  |
| ADVERSE PUBLIC IMAGE |  |

## APPENDICES

|                                       |  |
|---------------------------------------|--|
| MARKET RESEARCH STUDY:<br>CLIENTS     |  |
| MARKET RESEARCH STUDY:<br>COMPETITION |  |
| MARKET RESEARCH STUDY:<br>ENVIRONMENT |  |
| KEY INFO SOURCES                      |  |

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