



BUSINESS PLAN

Your business plan serves as your north star. By the time you complete this template, you'll have laid out a roadmap for your marketing, financial, and operational goals. Whether you're just starting or have been in business for years, this powerful tool can propel you to advance your mission and help you get outside funding if needed.

Your business plan is for both you and anyone you work with as well as for external audiences. For example, you can use your plan to attract investments or secure a loan from a financial institution. Your business plan also ensures partners and leaders are on the same page about targets and strategic action items.

The best business plans include an executive summary and sections on products and services, marketing strategy and analysis, and financial planning. Be sure to review and update your business plan thoroughly each year so that it accurately reflects your current goals and strategies. Consult your team or trusted mentors to get feedback and continually improve your plan.

To the health and success of your business!
-The Invoice2go, a Bill.com company, team

PREPARED FOR	
PREPARED BY	
DATE	
CONTACT INFORMATION	

TABLE OF CONTENTS

EXECUTIVE SUMMARY	2
BUSINESS OVERVIEW	3
MANAGEMENT TEAM	4
SERVICE / PRODUCT LINE	5
MARKET ANALYSIS	6
SALES AND MARKETING STRATEGY	7
FINANCIAL PROJECTIONS	8
FUNDING REQUESTS	9
DISCLAIMER	10

EXECUTIVE SUMMARY

An executive summarizes the key points of this business plan. State the objectives and highlight the strategies, financial projections, and financial needs.

BUSINESS OVERVIEW

The business overview states your business story and vision. Address who are you and what do you do? Also, identify your company's legal business structure. I.e. Sole proprietorship, limited liability corporation (LLC), limited liability partnership (LLP) and etc...



MANAGEMENT TEAM

This section explains the makeup of your company.
Who runs each part of the business, their responsibilities, and their ownership stakes in the business.

SERVICE / PRODUCT LINE

This section explains what consumer problem your product or service addresses.



MARKET ANALYSIS

This section aims to show your company has a viable market. Provides a competitive analysis of your target market and potential competition.

SALES AND MARKETING STRATEGY

In this section, share your action plan for marketing and sales. Show how you will reach your target audience and convince them to support your brand.



FINANCIAL PROJECTIONS

This section details your anticipated traction in the market, planned milestones, and projected earnings. Make sure you have data to back up these financial projections.

FUNDING REQUESTS

This section will state how much money you need to launch and sustain your business. Be sure to provide data to back up any claims.

DISCLAIMER

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