



SECTION 4 - Product Definitions and Services Offered

This section will specifically describe the products that you offer to your target market as well as any services that augment your basic product. It will explain any advantages that you feel your product or service is offered over competitive products in the marketplace. Include any literature or material that may be beneficial in communicating the nature of your offerings to the market as an attachment to this report.

Your goal is to relate your products and services to your mission statement and your target market. Readers will be able to determine what it is you offer in the marketplace, pricing and any competitive advantage you feel you have.

SECTION 5 - Organizational Structure and Management

Begin with a description of the legal form of ownership of the business, the management team and subordinate leaders along with job descriptions for each. An organizational chart illustrating the general flow of operations should be included in this section. Any legal requirements such as special licensing, permits, or certifications that the company has should be detailed.

SECTION 6 - Marketing Strategy (Includes Sales)

This section should detail your target market in terms of geographic area, demographic profile, psychographic variables and any other details unique to the housing industry. Include such items as homeownership rates, the incidence of single-family households, education level and income levels. Some projection of market growth would also be appropriate.

Also included should be a statement of tactics used to communicate with and reach your target population. A discussion of their traditional tactical variables of pricing, promotion, product mix, and geographic locations is appropriate here. Particular emphasis should be paid to your sales strategy.

SECTION 7 - Finance

This section will provide an understanding of the financial capacity and condition of your company. It should include a projection of startup costs, pro forma balance sheets and income statements and the resulting cash flow for any new operations anticipated by the company.

An ongoing business operation should include financial statements for the last three years. Personal financial statements and/or tax returns may be required if the business plan is used to secure additional financing.

SECTION 8 - Attachments

Attach any general information that may be used to support the comments in other sections of the business plan, or may provide detail on background or continuing operations of the business.

Some items that may be included are:

- Brochure
- Employee résumés
- Specialized equipment or facilities
- PR materials
- Advertising materials
- Trend analysis
- SWOT analysis
- Legal agreements and commitments



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STRATEGIC BUSINESS PLAN GUIDE

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There are several elements included in a comprehensive business plan, but those who undertake the planning process for the first time may find it beneficial to abbreviate some of the detail that is indicated here. As you gain more insight and experience about the process, you may wish to expand on the information contained in it.

There are many different ways to create your plan. Just as each company has its own personality, each business plan should reflect the personality of its company. There are few rules, after all some planning is better than no planning. If you have never looked at your company strategically, you may find anticipating how the company, its environment and its competition will be positioned three to five years away to be a daunting task. There are certain things that you want to keep in mind as you navigate through the process.

- Do not assume that the planning process has an expiration date. Your plan is based upon a static evaluation of a dynamic, ever changing series of relationships between your company, customers and your competition, all operating in a fluctuating environment. Good plans take this into account. Good managers use their plans to adjust their operation to these changes.
- The more stakeholders in your organization that provide input, the more actionable information you will have upon which to base your planning process. A basic Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis is a good place to start, and will solicit opinions from employees, customers, vendors, management and community leaders providing you with a foundation for action.
- A good plan should not be judged by weight or length. Stay focused. Trying to accomplish too much can be as harmful as not attempting anything. You want to be realistic about what you can accomplish. Your focus will permit the construction of specific goals. If you can't measure it, it probably isn't specific enough.
- Your plan should be descriptive of your company and its journey to the goals established for the future. Your story needs to take a written form that can be shared with others. Remember the basics of storytelling; Who, What, When Where, Why, and most important How.

You may not be ready to start yet. There are two important activities to undertake that provide the basis for planning. First is the SWOT Analysis that describes the relationship your company has with the market and the players in it. Next is an evaluation of industry trends that will provide some perspective of what you will find in the future. You will find outlines to assist you with these activities appended to your plan outline.

It's easy to get started, just fill in the blanks.

PAGE 1 – Create a title page or cover page with information about the company:

Company Name

Title the document, i.e., Strategic Business Plan

Date Put in the date created and then add the date of each modification.

Put in the address, physical location and mailing address, and the contact information to include phone numbers, fax numbers, e-mail and web addresses.

PAGE 2 - A table of contents with page numbers. You will include:

Table of Contents
 Executive Summary
 Business Description and Vision
 Market Definition
 Product Definitions and Services Offered
 Organizational Structure and Management
 Marketing Strategy (Includes Sales)
 Finance
 Attachments

From this point on, the content will be in sections, not pages.

SECTION 1 - Executive Summary

The goal of this section is to interest readers in the process of learning more about your business. It should provide them with some insight about your company and should summarize the operation of your organization.

Because it is a summary, of necessity it will be the last section written. It should provide a brief overview of your company explaining just what it is that you do whom you are and why you have chosen to operate this particular company.

Be brief. You should be able to condense your plan and to no more than two pages.

SECTION 2 - Business Description and Vision

This section will detail the business purpose, sometimes referred to as the mission statement. It will also describe the growth anticipated for the company, often referred to as the company vision statement. Typically, this section will list the key company management team and their background, contain a brief history of the business, and detail the business goals and objectives for the organization.

Once this section is complete, those reading it will understand the background of the company, what it is and what it stands for; your feelings about the potential of the company and the growth you envision for it. It will also contain specific goals and objectives in measurable terms and with suspense dates.

SECTION 3 - Market Definition

This section will include basic information about the industry that you operate in and the customer needs that you feel you are satisfying. It will address the scope of your business as well as your current share of the market. It will also identify who your target customer is.

You should describe the industry in detail and your understanding of the outlook for the future based upon your trend analysis you will be able to communicate the strengths and weaknesses of your existing market and how it will evolve in the future. This section will also describe your share of the market and your anticipation of future market share and will identify a general profile of targeted customers and quantify the overall size of your target market.