



# BUSINESS PLAN STARTER KIT

## SBA-FRIENDLY LEAN FRAMEWORK

A SmallBiz Recon™ Strategic Planning System

Business Name: \_\_\_\_\_

Owner: \_\_\_\_\_ Date: \_\_\_\_\_

Contact Info: \_\_\_\_\_

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# OPERATION: BUSINESS FOUNDATION

## MISSION BRIEF

- Lean structure aligned with SBA lender expectations
- Organized presentation of all critical business data
- Lender-ready format for funding review
- Expansion-ready framework — grows with your business



This kit is your tactical briefing document.  
Fill it in. Own it. Present it with confidence.

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# COMMAND SUMMARY

## Executive Summary – Fill-In Framework

### BUSINESS OVERVIEW

- [Insert Business Model]
- [Insert Key Offerings]
- [Insert Target Customer]

### CAPITAL REQUEST

- [Insert Amount Needed]
- [Insert Type of Funding]
- [Insert Timeframe]

### USE OF FUNDS

- [Insert Allocation 1]
- [Insert Allocation 2]
- [Insert Allocation 3]

### MARKET OPPORTUNITY

- [Insert Market Size]
- [Insert Growth Trend]
- [Insert Market Share Goal]

### COMPETITIVE EDGE

- [Insert Unique Selling Prop.]
- [Insert Barriers to Entry]
- [Insert Strategic Advantage]

### FINANCIAL SNAPSHOT

- [Insert Revenue Projection]
- [Insert Profit Margin]
- [Insert Key Financial Metric]

# UNIT PROFILE

Company Overview — Structural Foundation



LEGAL STRUCTURE

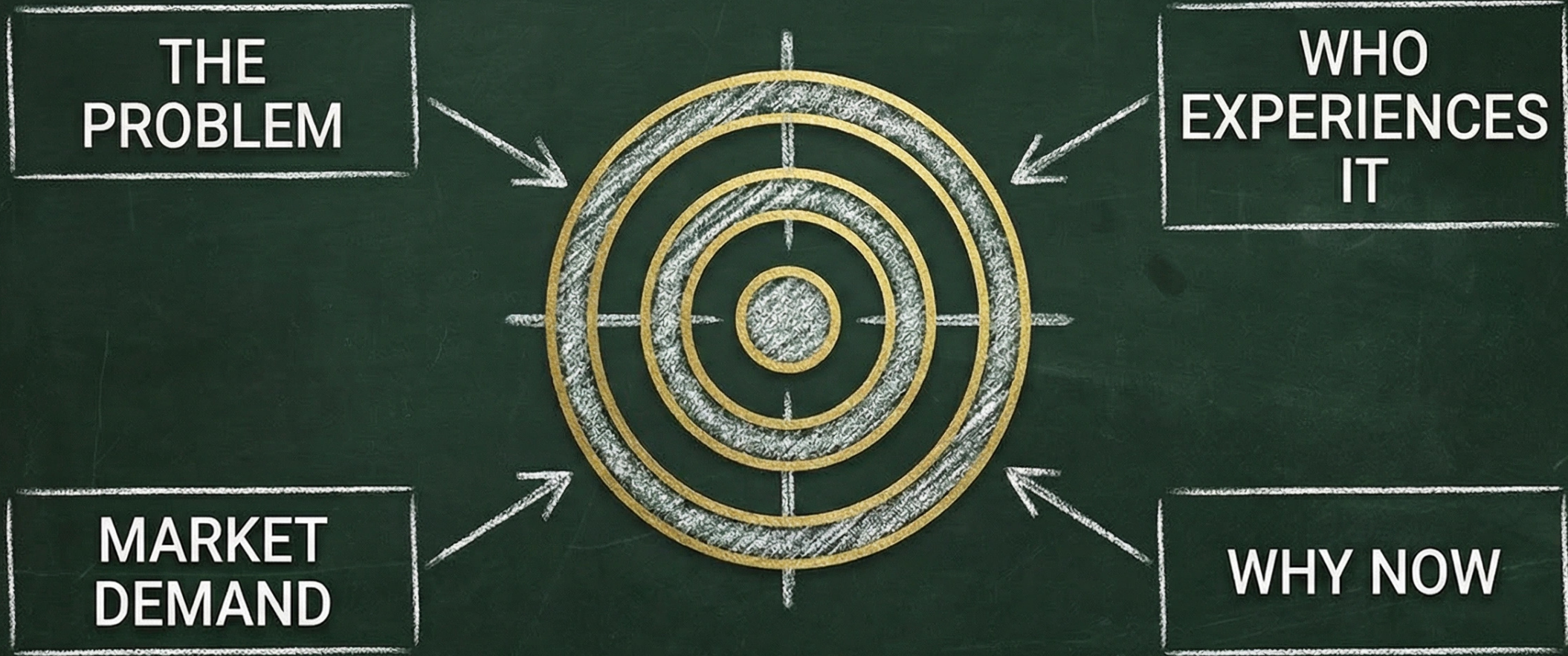
OWNERSHIP

LOCATION

MISSION STATEMENT

BUSINESS STAGE

# THE OBJECTIVE



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# TACTICAL OFFERING

## CORE PRODUCT / SERVICE

Describe your primary offering. What specific problem does it solve? How does it provide unique value to your target market? Detail the key features and benefits. Focus on the mission-critical components.

## PRICING MODEL

Outline your pricing strategy. Is it tiered, subscription-based, per-unit, or project-based? Explain the rationale behind your pricing structure. How does it align with market value and customer budget?

## DELIVERY MODEL

Explain how your product or service is delivered to the customer. Detail the channels, logistics, and processes involved. Are there digital, physical, or hybrid delivery methods? Focus on efficiency and reliability.

## SUPPLY CHAIN

Describe your supply chain operations. Identify key suppliers, partners, and resources. How do you ensure consistency, quality, and resilience in your supply chain? Address potential risks and mitigation strategies.



MISSION READY



# TARGET ACQUISITION PROFILE

## IDEAL CUSTOMER

Describe your primary target audience. What specific characteristics define them? What are their primary needs, challenges, and pain points? Focus on their mission-critical requirements.

## DEMOGRAPHICS

Age Range: [25-45], [45-65] Gender: [M/F/Any]  
Income Level: [HHI \$75k+], [\$150k+]  
Education: [Bachelor's], [Master's]  
Occupation: [Specific roles/industries]  
Marital Status: [Single/Married].

## GEOGRAPHIC FOCUS

Region: [North America], [Global]  
Country: [USA], [UK], [Canada]  
City/State: [Urban/Rural], [Specific Metros]  
Climate: [Specific Conditions]  
Language: [English], [Spanish]

## BUYING BEHAVIOR

Purchase Triggers: [Specific events/needs]  
Decision Process: [Individual/Committee]  
Average Order Value: [\$X-\$Y]  
Frequency: [One-time], [Recurring]  
Channels: [Online], [Direct Sales], [Retail]

**Know your target. Own your market.**



# COMPETITIVE INTELLIGENCE

## COMPETITOR 1

Strengths:

- \_\_\_\_\_
- \_\_\_\_\_

Weaknesses:

- \_\_\_\_\_
- \_\_\_\_\_

## COMPETITOR 2

Strengths:

- \_\_\_\_\_
- \_\_\_\_\_

Weaknesses:

- \_\_\_\_\_
- \_\_\_\_\_

## COMPETITOR 3

Strengths:

- \_\_\_\_\_
- \_\_\_\_\_

Weaknesses:

- \_\_\_\_\_
- \_\_\_\_\_

## STRENGTHS

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## WEAKNESSES

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## OPPORTUNITIES

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## THREATS

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

OUR DIFFERENTIATION:

\_\_\_\_\_



# REVENUE STRATEGY

## REVENUE STREAMS

[Primary Product/Service] – **\$XXXXK**  
[Secondary Service] – **\$XXXXK**  
[Subscription/Recurring] – **\$XXXXK**  
[Upsell/Cross-sell Opportunities]

## PRICING LOGIC

[Cost Basis Analysis] – Cost to Acquire: **\$X**; COGS: **\$X**  
[Margin Goal] – Target Margin: **X%**  
[Competitive Positioning] – Market Price: **\$X**; Our Price: **\$X**

## SALES CHANNELS

Direct Sales Force  
Online Store (E-commerce)  
Retail Partnerships  
Wholesale/Distribution  
Affiliate Program

## GROWTH ASSUMPTIONS

Year 1: **+X% Growth** Year 1 Revenue: **\$XXXXK**  
Year 2: **+X% Growth** Year 2 Revenue: **\$XXXXK**  
Year 3: **+X% Growth** Year 3 Revenue: **\$XXXXK**



# DEPLOYMENT STRATEGY

## LEAD GENERATION

Targeted outreach  
Content marketing  
Networking

## CONVERSION PROCESS

Sales pipeline  
Offer optimization  
Closing techniques

## PARTNERSHIPS

Strategic alliances  
Affiliate programs  
Joint ventures

## RETENTION

Customer support  
Loyalty programs  
Feedback loops



# FIELD OPERATIONS

## DAILY EXECUTION

- [Daily Task 1 Placeholder]
- [Daily Task 2 Placeholder]
- [Daily Task 3 Placeholder]
- [Daily Workflow Notes]

## STAFFING

**Key Roles:** [Role 1], [Role 2], [Role 3]

**Team Structure:** [Structure Placeholder]

**Recruiting & Onboarding:** [Notes]

## SYSTEMS & TECHNOLOGY

**Core Software:** [Software 1], [Software 2]

**Communication Tools:** [Tool 1], [Tool 2]

**Hardware:** [Equipment Placeholder]

## VENDORS & SUPPLIERS

**Primary Vendors:** [Vendor 1], [Vendor 2]

**Supply Chain:** [Details Placeholder]

**Service Contracts:** [Notes]

## FACILITIES

**Location(s):** [Address Placeholder]

**Square Footage:** [Sq Ft Placeholder]

**Maintenance:** [Plan Notes]



# COMMAND TEAM



## FOUNDER / OWNER

**Name:**

[Name]

**Background:**

[Name]

**Experience:**

[Name]

**Industry Expertise:**

[Name]

## KEY TEAM MEMBERS

**Name:**

[Name]

**Role:**

[Role]

**Experience:**

[Name]

## ADVISORS & MENTORS

**Name:**

[Name]

**Expertise:**

[Name]

**Affiliation:**

[Name]

## CAPABILITY TO EXECUTE:

[Detailed description of the team's combined capability to execute strategies, including specific skills, resources, and proven track record.]



# FINANCIAL BRIEFING

## STARTUP COSTS

Equipment  
Inventory  
Marketing

## CAPITAL REQUEST

Amount  
Loan Type  
Term

## USE OF FUNDS




## 3-YEAR PROJECTION

Year 1 Revenue  
Year 2 Revenue  
Year 3 Revenue

## BREAK-EVEN TARGET

Fixed Costs  
Units  
Month

## SUPPORTING DOCS

 Placeholder for  
attaching financial  
statements

# RISK MITIGATION & LONG-TERM STRATEGY

## OPERATIONAL RISKS

- [Internal Processes Placeholder]
- [Supply Chain Disruptions Placeholder]
- [Technology Failure Placeholder]
- [Workforce Challenges Placeholder]

## MARKET RISKS

- [Competitive Landscape Placeholder]
- [Regulatory Changes Placeholder]
- [Economic Fluctuations Placeholder]
- [Customer Preference Shifts Placeholder]

## MITIGATION PLAN

[Specific Step 1 Placeholder]  
[Specific Step 2 Placeholder]  
[Specific Step 3 Placeholder]  
[Specific Step 4 Placeholder]  
[Specific Step 5 Placeholder]

## GROWTH ROADMAP

Phase 1: [Initiation & Foundation Placeholder]  
Phase 2: [Expansion & Scale Placeholder]  
Phase 3: [Sustainment & Innovation Placeholder]

Prepared with **discipline**. Built for **approval**.



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