

Name of Program/Business Business Plan and Current Date

The Why

- **Vision and Mission**
- **Credo (if appropriate, e.g., “We believe”...)**
- **Target Market**
 - High-level demographics
 - High-level psychographics/lifestyle
 - Groups/segments
 - Other (needs, ideal client characteristics, etc.)

The What

- **Business Structures and Models (e.g., LLC and fee-for-service)**
- **Roles/Responsibilities (key leaders/staff/personnel and their purview)**
- **Products, Services, Programs, Philanthropy, etc. (list and brief description)**
- **Key Benefits/Positioning/Branding**

The How

- **Major Milestones and Timing**
 - Year 1: Description, results (more detail/sub-milestones for Year 1)
 - Year 2: Description, results
 - Year 3: Description, results
- **Financial Projections (3 years)**
 - Annual revenues
 - Annual expenses
 - Major/capital expenditures
 - Financing strategies (if needed)
- **Risks/Dependencies**

Additional Information (as needed)

- Description/“samples” of ideal clients
- Marketing/Branding Plan
- Technology Plan
- Etc...