
CEO TRANSFORMATION TECHNOLOGIES LLC

BUSINESS PLAN STARTER WORKBOOK™

Turn your idea into a business story you can actually explain.

FREE CEO RESOURCE

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TURN YOUR IDEA INTO A BUSINESS STORY.

A business plan should sound like the business you are actually building, not a pile of impressive words. If you cannot explain the customer, offer, pricing, operating model and numbers out loud, the written plan probably is not clear enough yet. Use this workbook to get the raw facts on paper first.

WRITE THE VERSION YOU CAN DEFEND

Do not invent market size, revenue or projections because the number looks better. Write what you know, label what is estimated, and keep a note of what still needs research.

1. COMPANY OVERVIEW

Business name:

Legal structure:

Location or service area:

What does the business sell?

What problem does the business solve?

What makes the business different?

2. CUSTOMER & MARKET

Who is the ideal customer?

What does the customer need most?

Who are the main competitors?

Why would a customer choose you?

How large is the market or service area?

3. PRODUCTS & SERVICES

List your primary products or services:

How are they priced?

What are your estimated costs?

Which offer is most profitable?

What will you add in the next 12 months?

4. MARKETING & SALES

How will customers discover you?

What is your sales process?

What is your monthly marketing budget?

Which channels will you use?

What is your monthly sales target?

5. OPERATIONS

Who performs the work?

What equipment or software is required?

What vendors or suppliers are critical?

What licenses or insurance are needed?

What systems or automations are needed?

6. FINANCIAL PLAN

Monthly revenue goal:

Monthly expense estimate:

Break-even target:

Funding amount needed:

Use of funds:

Expected impact of funding:

EXECUTIVE SUMMARY DRAFT

In 3-5 sentences, explain the business, customer, problem, solution and growth goal. Write it after the rest of the workbook so the summary reflects the actual plan.

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