

# **SAMPLE BUSINESS PLAN OUTLINE**

The following outline addresses the key points that we would like to see in an executive summary. These five areas will give us a good understanding of the business in order for us to better assess it's fit with our investment criteria. Further information, if it is warranted, may be requested as the review process continues.

## **A. Business Concept**

CID needs to clearly understand what this business is about and the value that it creates for its customers.

1. Company Description
2. Value Proposition
3. Competitive Advantage
  - a. Barriers to Entry
  - b. Proprietary Technology
  - c. Switching Costs
4. Development Timeline/ Milestones

## **B. Management Team**

CID believes in the importance of experienced leadership. We are interested in learning more about the key figures spear-heading the development of your business.

1. Industry or Functional Experience
2. Educational Background

## **C. Market**

CID wants to understand the market potential for this business.

1. Estimated Size of Target Market
2. Expected Growth Rate
3. Industry Composition
4. Distribution/ Sales Channels

## **D. Competitors**

CID must understand who your competitors are and how you will defend against this rivalry. We believe that all businesses have competitors, no matter how customized or industry focused.

1. Competitors
2. Strategic Competitive Advantage

## **E. Financials**

CID requires a complete set of financials in order to better understand the business's operations and the necessary capital requirements.

1. Income Statement (3-5 year projections)
2. Balance Sheet
3. Cash Flow Statement
4. Assumptions Underlining These Numbers