SMALL BUSINESS

Describe the business

Write a plain-language summary before adding details.

SIMPLE BUSINESS PLAN WORKBOOK

ONE-PARAGRAPH PLAN

State what you sell, for whom, where or how you deliver it, and why customers may choose it.

EXAMPLE

Northside Repair provides appointment-based bicycle tune-ups for commuters in three nearby neighborhoods.

PUT IT INTO PRACTICE

What will a customer be able to do after buying?

What will I not offer at launch?

FOUNDATIONS CHECKLIST

- [ ] Business name or working name.
- [ ] Primary customer and delivery area.
- [ ] Core product or service.
- [ ] Launch milestone and first 90-day goal.

This workbook supports planning and is not legal, tax, financial, investment, or lending advice. Verify rules, licenses, funding terms, and projections with official sources and qualified professionals.

SMALL BUSINESS

Understand the customer

Use observation and conversations, not assumptions alone.

SIMPLE BUSINESS PLAN WORKBOOK

CUSTOMER SNAPSHOT

Describe the situation that triggers a purchase, the current workaround, and the desired outcome.

EXAMPLE

A commuter needs a reliable bike before Monday and does not have tools or time for a tune-up.

PUT IT INTO PRACTICE

What problem feels urgent or costly to this customer?

What would make them hesitate?

FIVE DISCOVERY QUESTIONS

- [ ] How do you handle this today?
- [ ] What is frustrating about that approach?
- [ ] What would a good outcome look like?
- [ ] What alternatives have you considered?
- [ ] What matters most when choosing a provider?

SMALL BUSINESS

Map the offer and competition

Positioning is a clear choice, not a claim that nobody else exists.

SIMPLE BUSINESS PLAN WORKBOOK

COMPARE ALTERNATIVES

List direct competitors and substitutes such as doing nothing, doing it themselves, or choosing a larger provider. Note observable facts, not guesses.

EXAMPLE

Competitor A offers walk-ins; Northside offers scheduled evening pickup and a written service checklist.

DECISION GUIDANCE

- [ ] Compete on one or two strengths you can consistently deliver.
- [ ] Do not promise fastest, cheapest, and highest-touch service at once.
- [ ] Test your message with prospective customers.
- [ ] Review competitors periodically; do not copy confidential material.

SMALL BUSINESS

Choose a sales path

Make the steps from awareness to purchase visible.

SIMPLE BUSINESS PLAN WORKBOOK

SIMPLE CUSTOMER JOURNEY

For each stage, name the customer question and your response: discover, evaluate, buy, receive, return, refer.

EXAMPLE

Evaluate: ·Can I trust this repair?· Response: published services, transparent estimate process, and customer reviews where permitted.

WEEKLY SALES ACTIONS

- [ ] Contact two referral partners.
- [ ] Publish one useful answer to a common question.
- [ ] Follow up on open estimates respectfully.
- [ ] Record lead source, status, and next action.

SMALL BUSINESS

Plan delivery and operations

Identify what must happen reliably after a sale.

SIMPLE BUSINESS PLAN WORKBOOK

DELIVERY MAP

Outline intake, preparation, service, quality check, handoff, payment, and follow-up.
Assign an owner and backup for each critical step.

PUT IT INTO PRACTICE

Where could a delay affect the customer?

What information must be captured at intake?

OPERATING CHECKLIST

- [ ] Suppliers and realistic lead times.
- [ ] Equipment, workspace, and maintenance needs.
- [ ] Data protection and customer communication practices.
- [ ] Quality standard and escalation path.
- [ ] Permits, safety, or insurance questions to verify officially.

SMALL BUSINESS

Build cautious numbers

Use assumptions you can name and update.

SIMPLE BUSINESS PLAN WORKBOOK

BASIC FORECAST

Estimate monthly sales as number of customers times average sale. Then list direct costs, operating costs, and timing of cash received and paid. Treat a forecast as a scenario, not a guarantee.

EXAMPLE

20 tune-ups × $90 average sale = $1,800 projected monthly sales before costs.

ASSUMPTION CHECK

- [ ] Mark each number as observed, quoted, researched, or guessed.
- [ ] Create cautious, expected, and strong scenarios.
- [ ] Include one-time setup costs separately.
- [ ] Ask an accountant or qualified adviser about tax and recordkeeping obligations.

SMALL BUSINESS

Set milestones and review

Turn the plan into small tests with dates.

SIMPLE BUSINESS PLAN WORKBOOK

NEXT 90 DAYS

- [ ] Week 1·2: speak with five likely customers.
- [ ] Week 3·4: test one offer and collect feedback.
- [ ] Month 2: document the delivery process.
- [ ] Month 3: compare actual results with assumptions and revise.

MONTHLY REVIEW PROMPTS

PUT IT INTO PRACTICE

Which customer need showed up repeatedly?

Which channel produced qualified conversations?

What cost, delay, or risk surprised us?

What will we stop, start, or improve next month?

PLAN-SHARING NOTE

If you share this plan with a lender, investor, partner, or agency, use their current requirements and seek professional review where appropriate.