Business plan executive summary

Summarize the business plan for a reader considering the business and its next step. Replace every bracketed prompt with your own verified content. Delete these instructions and any unused headings before sharing.

Prepared for: [Reader or organization]
Prepared by: [Name and role] Date: [Date]
Source plan or report: [Title, version and date]

Business and purpose

[Name the business, location and current stage. Explain what it does, who it serves and why this plan is being presented.]

Customer need and offer

[Describe the customer problem and the product or service that addresses it. State the benefit in plain language without unsupported claims.]

Market evidence

[Identify the target customers and relevant alternatives. Summarize the strongest evidence of demand, with its source and date. Distinguish research findings from assumptions.]

Delivery and team

[Explain how the business reaches customers and delivers its offer. Identify the people responsible and any important capacity gaps.]

Financial position and outlook

[Summarize relevant actual revenue, costs and cash position for a stated period and currency. Label forecasts separately and state the assumptions that drive them.]

Resources and next step

[State any funding or other resources requested, their intended use and timing. Name the next milestone, main risk and decision or action requested from the reader.]