

**Business Plan Competition**

**Executive Summary Template**

1. **Company Summary**   
   (Title Page with Management Team Names and Company Name)  
   *[The Company]* was founded in *[year]* and [describe what your business does or its principal mission or objective. *For example “and is a growing manufacturer of pencil lead.*
2. **Business/Product or Service**

[The Company] makes *[describe your product/service line].*

The Company produces/provides the following products/services:   
*[list products here in order of significance].*

Presently, our [main product] is in the *[pick one of: introductory, growth, maturity]* stage. It competes primarily based on *[competitive advantage].*  
Our future-plans include developing *[x, y, and z]* in *[year or timeframe]*.

(Describe the problem or need your company/product satisfies; Indicate current state of development of the product)

1. **Market Analysis**

We define our market as [define market*]. e.g. women’s athletic apparel, kitchen appliances, small business software]*. The total market size was approximately [$x] last [period available], and is expected to grow by [x%] by [year]. We currently hold [y%] of this market and believe we can capture [z%] of it by [year]. Some of our most notable customers include [*examples of customers*].

1. **Competitive Advantage**

We compete directly with [x and y] and alternatives to our product include [u and v]. Our product is unique/superior because of [x]. We have a competitive advantage because of our *[speed to market, established brand name, low cost producer status]*.   
We [anticipate/do not anticipate] new companies to enter this market

1. **Risk/Opportunity**

The greatest risks associated with our business today are [x, y, and z]. We feel we can overcome these risks because of [m]. Our biggest recognized opportunities include [a, b, c].

1. **Management Team**The management team is led by Chief Executive Officer [Name of CEO] who [founded the company in (year) / joined the company after working as (position) at (company)]. *[Add any relevant previous work experience]. [Add education. e.g. “She received her M.B.A. from the University of Iowa in 2002”]*The [title of position] is [name of position holder], [Add relevant work experience and education]  
   The [title of position] is [name of position holder], [Add relevant work experience and education]  
   The [title of position] is [name of position holder], [Add relevant work experience and education]
2. **Operations**

We have [manufacturing facilities / offices / branches] located in [location, location, location]. We currently perform [u] in house, while outsourcing [v]. Our total full time staff is [15 people] and our products are distributed by: *[method or distributor]*

1. **Capital Requirements**

We are seeking [$] which will enable us to [*describe what you will accomplish with the funds] by [describe how the funds will be spent*].   
We expect to provide an exit within [x] years by [a dividend of excess profits, recapitalization, sale of company, or public offering].

1. **Financial Analysis**

In [the most recent quarter/month], our company had sales of [x], and net income of [y], compared to sales of [u] and net income of [v] in [the previous quarter/month].

|  |  |  |  |
| --- | --- | --- | --- |
| Last Year | This Year | Next Year | Year Two |
| Sales: |  |  |  |
| Cash: |  |  |  |
| Assets: |  |  |  |
| Book Value: |  |  |  |

Previous capital raises for equity included [$x] in [month/year] from [name] for [y% for the company], [and…]