

Small Business Plan Template



**A simple business plan template
for service-based businesses**

Built for freelancers, consultants, contractors, creatives, and small business owners who need a practical plan without the corporate jargon.

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01 Executive summary

Think of this as your elevator pitch. Give a quick overview of what your business does, who it helps, the problem you solve, and your biggest business goal.

What does your business do?

Who do you help?

What problem do you solve?

What is your biggest goal this year?

Example:

[Business Name] helps [Target Audience] with [Service]. Our goal this year is to [Revenue Goal / Business Milestone].

02 Business overview

This section explains how your business works. Outline what you sell, how you make money, and why clients would choose you over competitors.

What services do you offer?

How do you charge clients?

What makes your business different?

Who is your ideal customer?

Pricing table

Service	Price	Notes

03 Marketing and sales plan

Map out how people will find your business and become paying clients. Focus on the channels, pricing, referrals, or sales process you'll use to generate revenue.

How will customers find your business?

What marketing channels will you use?

How will you turn inquiries into paying clients?

What does your sales process look like?

Marketing Channels

☐ Referrals	☐ Social media	☐ Networking
☐ Website / SEO	☐ Advertising	☐ Online marketplaces
☐ Other:		

04 Financial plan

Use this section to map out the numbers behind your business. Keep it simple and focus on startup costs, monthly expenses, revenue goals, and break-even planning.

Startup costs

Expense	Estimated cost
Equipment/tools	
Website/branding	
Software	
Licenses/insurance	
Marketing	
Other	

Monthly business expenses

Expense	Monthly cost
Software	
Phone/internet	
Fuel/travel	
Rent/workspace	
Marketing	
Other	

Revenue goals

Goal	Amount
Monthly revenue goal	
Average client value	
Clients needed per month	

04 Financial plan — continued

Financial prompt

How much does your business need to earn each month to cover expenses and pay yourself?

Funding request (optional)

If you need outside funding, explain how much money you need, what it will be used for, and how it supports your business goals.

How much funding do you need?

What will the money be used for?

How will funding support growth?

05 SWOT analysis (optional)

Use this section to think through your business's strengths, weaknesses, opportunities, and risks.

Strengths

What gives your business an advantage?

Weaknesses

What areas need improvement?

Opportunities

What opportunities could help your business grow?

Risks

What risks or challenges could affect your business?