



Instructions for BizPlanDB.com Business Plan Template

Thank you for your purchase of a BizPlanDB.com business plan template. This PDF file has been compiled to help you with the business planning process. The templates offered by BizPlanDB.com assist you in developing an investor/bank ready business plan.

This instructions guide is designed to help you operate the MS excel file and MS Word file for your business plan template. Within the Excel spreadsheet there are a number of arrows filled with instructions that will assist you with inputting information into their proper places. We designed the following instruction manual in a question based format.

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First a few notes about writing an effective business plan.

Your business plan is an important document. It is an outline of how you intend to develop and operate your business over the next three to five years. Business plans should be no longer than they have to be as many bankers, venture capitalists, and investors have several business plans to read on a daily basis. One of the other keys to writing a good business plan is to not be overly optimistic about the performance of the business while also not only focusing on the product or service you are selling. Once you begin your business' operations, you will soon realize that is a tremendous amount of work, and only about half of your time is spent directly selling your product/service. As such, your business plan should focus heavily on how you intend to market your business, the competition you will face, and how you intend to use your financing.

The business template in this kit provides you with a helpful guide towards completing your business plan. It is difficult work, and once you are complete, you should have a CPA and an attorney review the business plan before you submit it to a bank or an investor. You should review and refine your business plan several times before you consider it complete.

BizPlanDB.com wishes you the best with your future or current business venture!

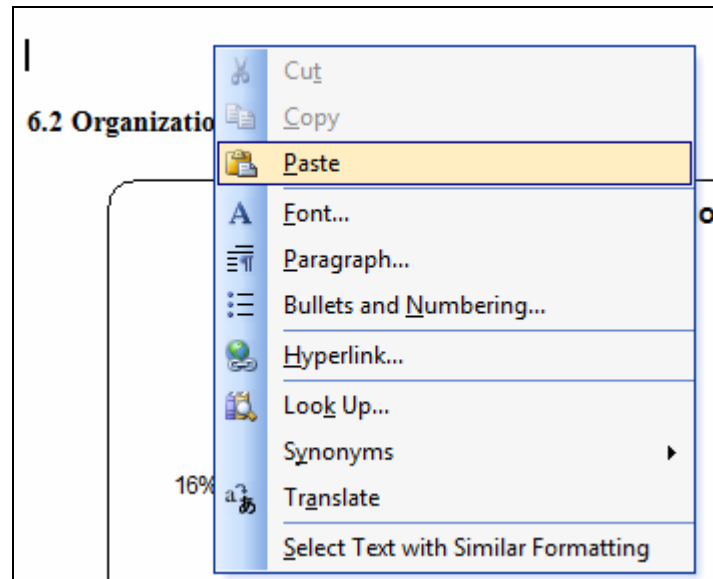
How do I update the MS Word Document with the information I inputted into the MS Excel file?

This is very simple. Simply cut and paste each graph into the business plan file. See image example below.

Personnel Plan - Yearly			
Year	2008	2009	2010
Owners	\$80,000	\$82,400	\$84,872
Real Estate Agent Manager	\$35,000	\$36,050	\$37,132
Marketing Staff	\$32,500	\$33,475	\$34,479
Non-Commissioned Agents	\$37,500	\$51,500	\$66,306
Administrative Staff	\$44,000	\$45,320	\$46,680
Total	\$229,000	\$248,745	\$269,469

Numbers of Personnel			
Year	2008	2009	2010
Owners	2	2	2
Real Estate Agent Manager	1	1	1
Marketing Staff	1	1	1
Non-Commissioned Agents	3	4	5
Administrative Staff	2	2	2
Totals	9	10	11

Highlight Table in Excel Using Mouse



And Paste Into Word Document

6.2 Organizational Budget



Personnel Plan - Yearly			
Year	2008	2009	2010
Owners	\$80,000	\$82,400	\$84,872
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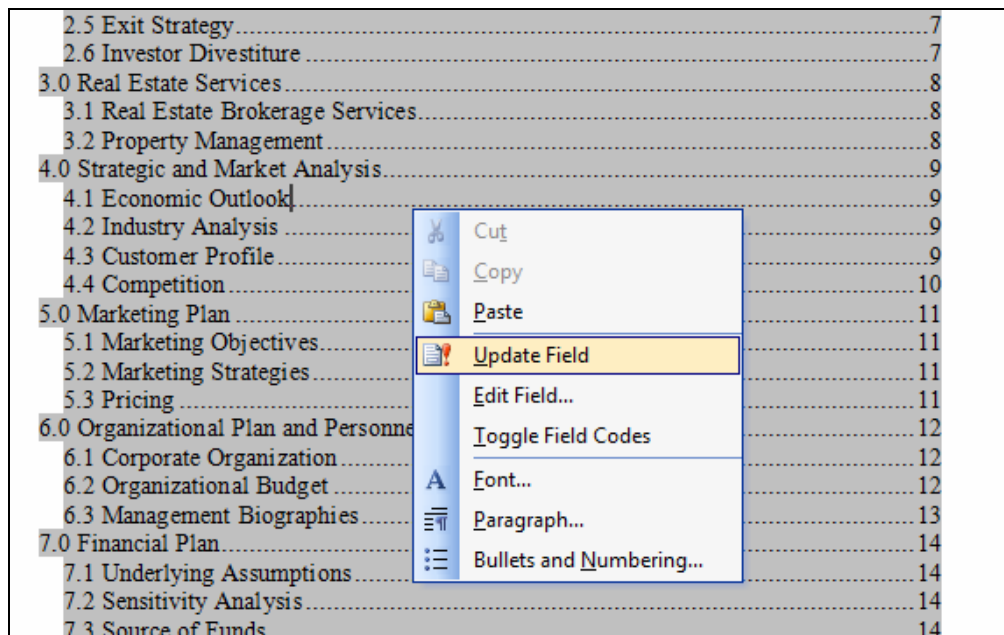


The Final Result!

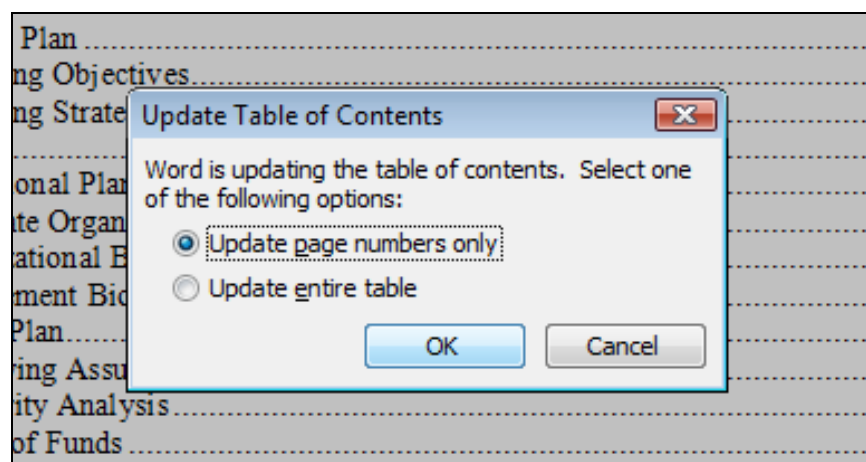
See the small box with + sign? Click on that to move the table within the document.

How do I update the page numbers on the table of contents (TOC)?

We are going to break this section down into two parts. First, let's assume you do not want to edit anything on the TOC. You just want to update the page numbers. Simply click on the table of contents and right click. Select the Update Field Tab:



Then



Click Ok!

That will update the page numbers. But what if you want to add a new section to the business plan template or you want to edit the names of the sections. Next page.

How do I add a new section to the Table of Contents (TOC)?

For this example (in the real estate business plan template), let's assume that you want to add a new section in the services section regarding mortgage services. First let's add the text to the document (Image 1):

Image 1

3.2 Property Management

In addition to providing real estate brokering services, the business will also manage residential and commercial properties for customers in the targeted market. This is an important part of the business as it will provide the Company with a recurring stream of revenue. This is especially important in today's real estate market as real estate sales have slowed.

3.3 Mortgage Services

We want mortgage services!

You can see that we added section 3.3 Mortgage Services. Now let's put it in the table of contents. First go up to the tool bar at the top of the page. Click View then Outline:

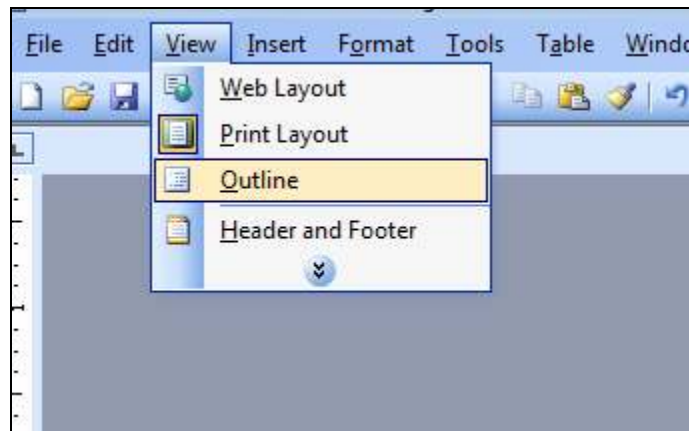


Image 2

You will now see a very different view of your document. Scroll down to the services page and highlight where it says section 3.3 Mortgage Services (see image on next page).

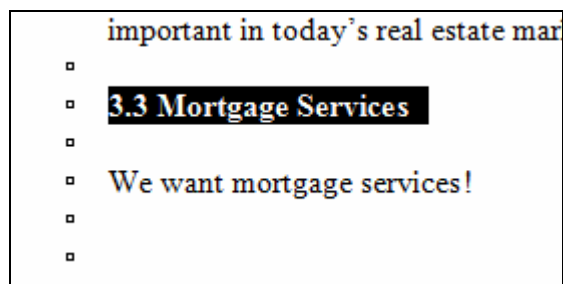


Image 3

Then go to the toolbar where it says body text and select the drop down menu (select Level 2 – This is to be explained below):

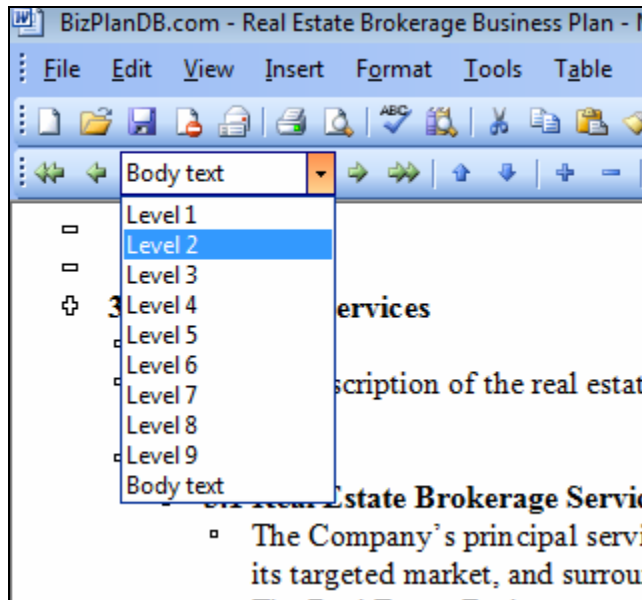


Image 4

Now, let's update the table of contents. Go back to toolbar and select:

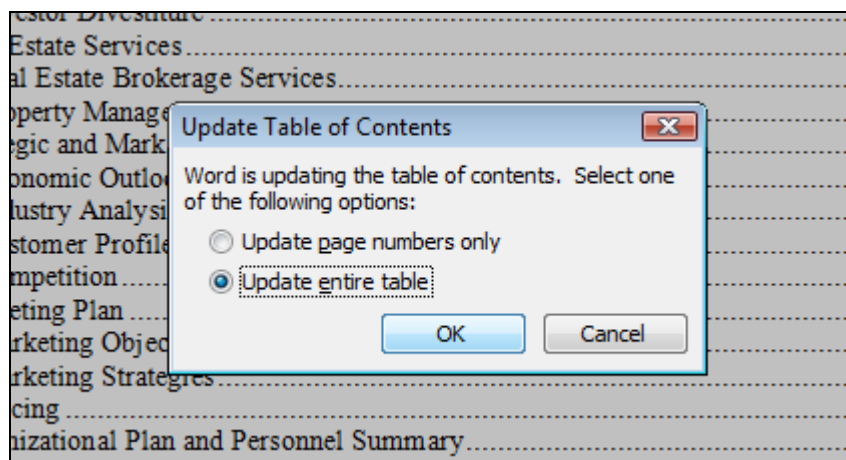
View – Print Layout

See image on next page.

Now to the table of contents. Right Click Update Field.

2.5 Exit Strategy.....	7
2.6 Investor Divestiture	7
3.0 Real Estate Services.....	8
3.1 Real Estate Brokerage Services.....	8
3.2 Property Management.....	8
4.0 Strategic and Market Analysis.....	9
4.1 Economic Outlook.....	9
4.2 Industry Analysis	9
4.3 Customer Profile.....	9
4.4 Competition	10
5.0 Marketing Plan	11
5.1 Marketing Objectives.....	11
5.2 Marketing Strategies.....	11
5.3 Pricing	11
6.0 Organizational Plan and Personnel.....	12
6.1 Corporate Organization.....	12
6.2 Organizational Budget	12
6.3 Management Biographies.....	13
7.0 Financial Plan.....	14
7.1 Underlying Assumptions.....	14
7.2 Sensitivity Analysis.....	14
7.3 Source of Funds.....	14

Then



Click Ok!

Let's see what happens (next page).

2.0 Investor Divestiture	7
3.0 Real Estate Services	8
3.1 Real Estate Brokerage Services	8
3.2 Property Management	8
3.3 Mortgage Services	8
4.0 Strategic and Market Analysis.....	9
4.1 Economic Outlook	9
4.2 Industry Analysis	9

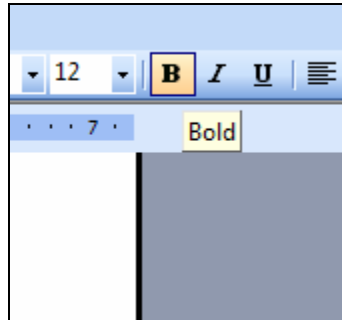
Section 3.3 has been added!

Sometimes, MS Word (for some reason) makes the entire table of contents bold when you click “Update Entire Table”. To change the table of contents back to normal text simply select the entire table of contents via highlighting with the mouse:

Table of Contents	
1.0 Executive Summary	4
1.1 The Services	4
1.2 Financing	4
1.3 Mission Statement	4
1.4 Management Team	4
1.5 Sales Forecasts	5
1.6 Expansion Plan	5
2.0 Company and Financing Summary	6
2.1 Registered Name and Corporate Structure	6
2.2 Required Funds	6
2.3 Investor Equity	6
2.4 Management Equity	7
2.5 Exit Strategy	7
2.6 Investor Divestiture	7
3.0 Real Estate Services	8
3.1 Real Estate Brokerage Services	8
3.2 Property Management	8
3.3 Mortgage Services	8
4.0 Strategic and Market Analysis.....	9
4.1 Economic Outlook	9
4.2 Industry Analysis	9
4.3 Customer Profile	9
4.4 Competition	10
5.0 Marketing Plan	11
5.1 Marketing Objectives	11
5.2 Marketing Strategies	11
5.3 Pricing	11
6.0 Organizational Plan and Personnel Summary	12
6.1 Corporate Organization	12
6.2 Organizational Budget	12
6.3 Management Biographies	13
7.0 Financial Plan	14

See Next Page

Then click Bold on the toolbar:

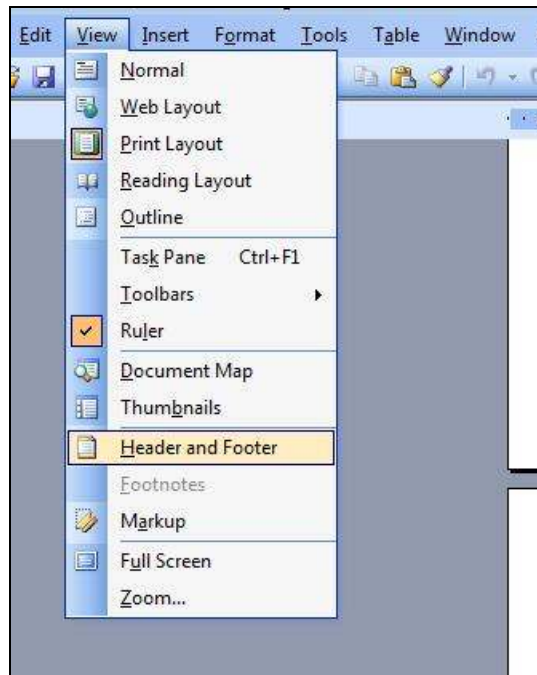


The table of contents will now go back to normal text.

How do I change the text on the top of each page (header)?

This is very simple. Simply go to the tool bar and select:

View – Header and Footer



You can now edit the text on the top of each page:

Image 2

