

CONSULTING BUSINESS PLAN TEMPLATE PDF

[Company Logo]
(if applicable)

[Company Name]

BUSINESS PLAN

[Current Month], [Year]

[Name]
[Title]
[Company Name]
[Address 1]
[Address 2]
[City, State
Zip] Tel: []
Fax: []
Email: []
Website: []

CONFIDENTIAL

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PLEASE READ THIS FIRST:

This consulting business plan template shows you each of the key sections that you must include in your business plan. It also includes the questions you must answer in each section and samples that were created by our business plan generator.

NOTE: If you need to complete your own consulting business plan, you can do so in just minutes using our [business plan generator](#). In addition to easily completing your business, perhaps most importantly, our business plan generator includes complete financial projections. You simply enter some numbers (for example the # of products/services you expect to sell and the price), and we automatically build your 5-year Income Statement, Balance Sheet and Cash Flow Statement.

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I. Executive Summary

Key Questions to Answer:

- *What does your business do?*
- *What market need does your business solve?*
- *What are 4-7 reasons why your business will be successful?*
- *How much capital, if any, are you seeking for your business?*

Sample from PlanPros.ai Generated Business Plan:

[Company Name], located at [insert location here] is a new small business consulting firm providing a wide range of advisory services to small local businesses. The company will operate in a professional setting, conveniently located next to [notable bank] in the center of the business district. [Company Name] is headed by [Founder's Name], an MBA Graduate from UCLA with 20 years of experience working as a business consultant, both for internal and external clients.

Products and Services

[Company Name] will focus on close client relationships. [Founder's Name], the lead consultant, will provide one-on-one consulting sessions with clients, group sessions with client teams, strategic planning services, fundraising consulting, and webinars of general interest to clients and potential clients.

[Company Name] has a full-time assistant who will contribute to research and analysis for client engagements. The assistant will also support the business through administrative services.

[Company's Name] services will be offered either as consulting sessions and short-term research and analysis for an hourly rate or defined projects on a fee-basis.

II. Company Overview

Company Profile

- *Where are you located?*
- *When were you formed?*
- *What is your legal entity form?*

Company Vision/Mission Statement

- *What goals is your company trying to achieve?*

Past Accomplishments

- *What successes has your company already achieved?*

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While [Founder's Name] has been in the management consulting business for some time, it was in [month, year] that he decided to launch [Company Name]. Specifically, during this time, [Founder] met with a former friend and fellow independent small-business consultant in Fort Lauderdale, FL who has had tremendous success. After discussing the business at length, [Founder's Name] clearly understood that a similar business would enjoy significant success in his hometown.

Specifically, the customer demographics and competitive situations in the Fort Lauderdale location and in his hometown were so similar that he knew the business would work. After surveying the local population, [Founder's name] went ahead and founded [Company Name].

III. Industry Analysis

Market/Industry Overview

- *In what market(s) do you compete?*

Market/Industry Trends

- *What are the key market trend(s) and how does that affect you?*

Relevant Market Size

- *How large is your relevant market (the # of customers who can realistically buy from you)?*

Sample from PlanPros.ai Generated Business Plan:

Last year, according to IBISworld.com, management consulting services in general brought in revenues of \$156 billion and employed 876,000 people in the United States. There were 371,000 businesses in this market, for an average of \$178,000 of revenue per employee, industry-wide. The average salary paid to a management consulting industry employee was \$68,845.

These figures do include a wide range of large-scale businesses, such as industry leaders like Deloitte Touche Tohmatsu, Accenture Ltd., Marsh and McLennan Companies, Inc, Booz Allen Hamilton Inc., and McKinsey & Company. Small business consulting firms are smaller than the average consulting firm, and the average salary paid is lower.

Small business consulting firms generally operate on a local-level, with single offices serving businesses in a 20-mile radius. The founders of these firms are generally business consultants from the larger firms or experienced business owners and entrepreneurs.

A number of free services are offered for small businesses in the United States, creating downward pressure on prices for small business consultants. These include SCORE (the Service Corps of Retired Executives) recruits experienced business executives to act as consultants to small businesses in need. SCORE's services are primarily mentoring, either in-person or online, and do not include in-depth projects, research, or analysis. Basic free consulting is also provided at Small Business Development Centers (SBDCs) throughout the country. SBDCs are established by the US Small Business Administration, and organized at the state level. SBDCs attempt to provide free, one-on-one business advice and information to both existing and potential entrepreneurs.

IV. Customer Analysis

Customer Needs

- *What are the key needs of your target customers?*

Target Customer Profile

- *Who are your target customers? Give a detailed demographic profile.*

Sample from PlanPros.ai Generated Business Plan:

[Company Name] will serve small businesses in [company location] and the immediately surrounding area.

The area we serve is suburban, with retail stores as a primary business sector. In addition, services such as photographers, hairdressers, lawyers, accountants, restaurants, guest houses, and more are located in the area.

The precise demographics of the town in which our location resides is as follows:

V. Competitive Analysis

Direct Competitors

- *Who are your direct competitors? What are their strengths and weaknesses?*

Indirect Competitors

- *Who are your indirect competitors? What are their strengths and weaknesses?*

Competitive Advantage

- *What are your competitive advantages? Are these sustainable (can competitors emulate them)?*

Sample from PlanPros.ai Generated Business Plan:

[Company Name] competes indirectly with any service that provides advice and management consulting services for small businesses, including online resources, free mentoring services like SCORE and local SBDCs, and independent consultants. The following small business consulting firms are located within a 20-mile radius of [Company Name], and provide a wider range of small business services, thus providing direct competition for customers:

ABC Small Business Consulting

ABC Small Business Consulting is an owner-operated business run by Bob Johnson. Having started the business ten years ago, Johnson operates out of his home to keep costs down and meets with small businesses in the surrounding area at their offices. Johnson focuses primarily on mentoring and advisory services and does not undergo detailed research, analysis, and planning for clients.

ABC Small Business Consulting has an estimated \$150,000 in annual revenue and serves a small subset of area clients. However, its name and focus on small business consulting bring it to the top of local search rankings, leading many small businesses to consider working with Johnson.

VI. Marketing Plan

Branding

- *What is your desired brand positioning?*

Promotions Plan

- *How do you plan to promote your company's products and/or services?*

Sample from PlanPros.ai Generated Business Plan:

[Company name] will use several strategies to promote its name and develop its brand. By using an integrated marketing strategy, [company name] will win clients and develop consistent revenue streams.

The [Company Name] Brand

The [Company Name] brand will focus on the Company's unique value proposition:

- Client-focused small business consulting services, where the Company's interests are aligned with the customer
- Service built on long-term relationships
- Big-firm expertise in a small-firm environment

Promotions Strategy

Targeted Cold Calls

[Company name] will initially invest significant time and energy into contacting potential clients via telephone. In order to improve the effectiveness of this phase of the marketing strategy, a highly-focused call list will be used, targeting startups and small businesses. As this is a very time-consuming process, it will primarily be used during the startup phase to build an initial client base.

Referrals

[Company name] understands that the best promotion comes from satisfied customers. The Company will encourage its clients to refer other businesses by providing economic or financial

incentives for every new client produced. This strategy will increase in effectiveness after the business has already been established.

Additionally, [company name] will aggressively network with business incubators, small business development centers, small business accountants, lawyers working with startups and small businesses, and others in a position to work with small businesses and startups. This network will generate referral leads.

VII. Operations Plan

Key Operational Processes

- *What are the key operational processes that your organization needs to accomplish on a daily basis to achieve success?*

Business Milestones

- *What milestones will you need to accomplish over the next 1-3 years in order to achieve success?*

Sample from PlanPros.ai Generated Business Plan:

[Company Name] will carry out its day-to-day operations primarily on an appointment basis. Clients will make appointments for advisory sessions, interview sessions to gather information for proposals, and further meetings throughout client engagements. These will often occur at the company office location to remove clients from the distractions of their business. In-process meetings may occur on-site at the client's business in order to increase the strength of the client relationship. If necessary, appointments can be conducted over the telephone.

[Founder's Name] will work on an as-needed basis, but can be expected to be present in the office during normal business hours. The company will also employ an assistant/analyst who will staff the office during normal business hours and support marketing and client relationship development efforts

VIII. Management Team

The Management Team section of the business plan must prove why the key company personnel are “eminently qualified” to execute on the business model.

Management Team Members

- *Who are the key members of your management team?*

Management Team Gaps

- *Who do you still need to hire?*

Sample from PlanPros.ai Generated Business Plan:

[Company Name]’s most valuable asset is the expertise and experience of its founder, [Founder’s Name]. [First name] has been a consultant for the past 20 years. He spent the first 10 years of that time as an internal consultant at Richards Technology Services. There he analyzed dozens of business units within the company, working with the top management of each to create strategic plans for future growth and deal with pressing challenges. After leaving RTS, [First name] was a senior consultant for Bain & Company for 10 years, where he worked with a variety of medium and large service industry business clients on general strategy and expansion strategy.

[Founder’s Name] has written white papers on business expansion strategy and spoken at consulting conferences representing Bain.

[Company Name] will also employ an experienced assistant to work as a business analyst and to help with various administrative duties around the office. [Assistant’s name] has experience working with C-level executives and has spent significant time as an analyst.

IX. Financial Plan

Revenue Model

- *In what ways do you generate revenues?*

Financial Highlights

- *What are your topline 5-year financial projections?*

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Funding Requirements/Use of Funds

- *How much money do you need to start and/or run your business?
What are the primary uses of these funds?*

Sample from PlanPros.ai Generated Business Plan:

[Company Name]'s revenues will come primarily from the fees earned from client consulting engagements (54% of revenue in first year) and advisory sessions (44%).

As with most services, labor expenses are the key cost drivers. [Founder's Name] and future consultants will earn a competitive base salary. The lease on the office location will be the next largest cost. Moreover, ongoing marketing expenditures are also notable cost drivers for [Company Name].

Capital Requirements and Use of Funds

[Company Name] is seeking a total funding of \$82,000 of debt capital to open its office. The capital will be used for funding capital expenditures and location build-out, hiring initial employees, marketing expenses and working capital.

Specifically, these funds will be used as follows:

- Office design/build: \$49,000
- Working capital: \$33,000 to pay for marketing, salaries, and lease costs until [Company Name] reaches break-even

Key Assumptions & Forecasts

	FY 1	FY 2	FY 3	FY 4	FY 5
Revenues					
Hotel	\$1,980,125	\$2,832,031	\$3,409,160	\$3,783,447	\$4,100,713
Total Revenues	\$1,980,125	\$2,832,031	\$3,409,160	\$3,783,447	\$4,100,713
Expenses & Costs					
Cost of goods sold	\$455,429	\$623,047	\$681,832	\$718,855	\$738,128
Lease	\$0	\$0	\$0	\$0	\$0
Marketing	\$149,006	\$141,602	\$170,458	\$189,172	\$205,036
Salaries	\$721,095	\$797,115	\$1,014,687	\$1,119,408	\$1,164,185
Initial expenditure	\$50,000	\$0	\$0	\$0	\$0
Total Expenses & Costs	\$1,375,530	\$1,561,763	\$1,866,977	\$2,027,436	\$2,107,349
EBITDA	\$604,595	\$1,270,268	\$1,542,183	\$1,756,011	\$1,993,364
Depreciation	\$372,760	\$372,760	\$372,760	\$372,760	\$372,760
EBIT	\$231,835	\$897,508	\$1,169,423	\$1,383,251	\$1,620,604
Interest	\$164,782	\$144,184	\$123,586	\$102,988	\$82,391
PRETAX INCOME	\$67,054	\$753,324	\$1,045,837	\$1,280,263	\$1,538,213
Net Operating Loss	\$0	\$0	\$0	\$0	\$0
Use of Net Operating Loss	\$0	\$0	\$0	\$0	\$0
Taxable Income	\$67,054	\$753,324	\$1,045,837	\$1,280,263	\$1,538,213
Income Tax Expense	\$23,469	\$263,663	\$366,043	\$448,092	\$538,375
NET INCOME	\$43,585	\$489,661	\$679,794	\$832,171	\$999,839
Net Profit Margin (%)	2.2%	17.3%	19.9%	22.0%	24.4%

X. Appendix

Sample from PlanPros.ai Generated Business Plan:

The following pages present detailed financial projections for [Company Name] over the next five years. The specific tables to follow include:

- Startup Costs
- 5 Year Annual Income Statement
- 5 Year Annual Balance Sheet
- 5 Year Annual Cash Flow Statement
- Quarterly Income Statement for First 3 Years
- Quarterly Balance Sheet for First 3 Years
- Quarterly Cash Flow Statement for First 3 Years

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