



Business Plan Outline for a Coaching Business

The length of a business plan varies – because you are writing this for your own planning, include the information and level of detail that makes a difference for your focus and action steps.

1. Executive Summary – written last, this explains the history and trajectory of your business
2. Company Description – include a description of who, what, how, where, when, and why
 - a. Bio of each Coach that includes training and experience
 - b. Mission, Vision, Code of Ethics, Core Values
 - c. Goals and Objectives
 - d. Business Philosophy
3. Management and Organization – describe how you are structured and how you operate
 - a. Legal form of Ownership
(Sole Proprietor, Partnership, DBA, Business License, S Corp, LLC)
 - b. Insurance (Liability, Professional, Other)
 - c. Management
 - i. Oversight and Decision Making
 - ii. Standard Operating Procedures
 - d. Professional and Advisory Support
(Accountant, Attorney, Mentor, Advisor, other)
4. Products
 - a. Description and Pricing
 - i. Books, White Papers, CD's or MP3's or DVD's
 - ii. Training Programs
 - b. Unique selling points – what makes your products different
5. Services
 - a. Description and Pricing
 - i. Individual Coaching – describe how, list packages and prices
 - ii. Group or Team Coaching – describe, list prices
 - iii. Consulting or Speaking – describe what is offered, prices, and how it is separate from coaching
 - b. Niche and unique selling point – what makes your services different and special
6. Marketing Plan
 - a. Market Research – what is the interest in what you offer?
 - b. Target Market – be specific and include their interests
 - c. Competition - who are your competitors and what do they offer?
 - d. Strategy – how will you reach your audience and make the sale?
7. Operating Plan
 - a. Location – describe office set-up and security
 - b. Production and Inventory – what is your plan for developing products and how much will you keep on hand?
 - c. Service Scheduling – how and when will you schedule with clients?
 - d. Payment Policies and Processes – detail what forms of payment are used and also how and when clients pay



8. Financial Plan

- a. Financial Statements – budget, budget versus actual, profit and loss, income and expense
- b. Start-up Expenses – initial fees for licensing, website, etc.
- c. Regular Expenses – include set monthly amounts, variable monthly amounts, and periodic expenses
- d. Capitalization – will you capitalize large furniture or electronic purchases?
- e. Profit / Loss Projection – consider when income will be received and when expenses will be paid