



Template Startup Commercialization Plan

A good business plan always requires a good Executive Summary, and a solid Executive Summary can also serve as a quick pitch to a potential investor.

Executive Summary Template

[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”]. Our principal offices are located in [x].

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].

The Market

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].

Competition

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.

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].

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”]



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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]

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].

Financial Snapshot

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
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Sales:

Cash:

Assets:

Book Value:

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