



**U.S. SMALL BUSINESS ADMINISTRATION 8(a) BUSINESS DEVELOPMENT PROGRAM**

# 8(a) BUSINESS PLAN GUIDE

Your business plan is the foundation of your business and is a way to think through the key elements of your business. The business plan helps determine and outline the objectives and goals for your business and serves as a roadmap for how to structure, run, and grow your new business. As an 8(a)-certified firm, you are required to create and submit a business plan to the SBA within 60 days of your certification. To help ensure your success, **this Business Plan Guide helps you understand all the key components that should be included in your business plan.**

In addition to the content included in this guide, you can use an appendix to provide supporting documents or other materials that might be helpful to include. Common items to include are organizational charts, key staff resumes, income statements, balance sheets, and other legal documents or contracts.

**If you have any questions, reach out to your Business Opportunity Specialist.**



## CONTACT INFORMATION

COMPANY NAME \_\_\_\_\_

COMPANY ADDRESS \_\_\_\_\_

CONTACT PERSON \_\_\_\_\_

TELEPHONE NUMBER \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

DATE OF ORIGINAL PLAN \_\_\_\_\_

DATE OF PLAN UPDATE \_\_\_\_\_

PLAN AUTHOR \_\_\_\_\_

# BUSINESS PLAN GUIDE

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## SECTION I.

### Executive Summary



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## Executive Summary

**1**

Briefly describe what your company is and why it will be successful. Include your mission statement, your product or service, and basic information about your company's leadership team, employees, and location. You should also include financial information and high-level growth plans if you plan to ask for financing.

This is a complete summary of your business plan and should be referred to on occasion by you and your assigned Business Opportunity Specialist to get a quick overview of your plan. You should prepare the summary after you have completed all other major components, which follow.



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# BUSINESS PLAN GUIDE

## SECTION II.

### **Company Description: History, NAICS Codes, Staffing, Capital, and External Support**



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# Company Description: History, NAICS Codes, Staffing, Capital, and External Support

2

**HISTORY**—Provide a brief history/overview of the business. Describe when, how, and why you formed the company and its development so far.

3

**NAICS codes**—List all the North American Industry Classification System (NAICS) codes—both primary and secondary—that your business is currently capable of performing. Briefly describe past experience (public or private sector work) with each NAICS/product or service offering.

As you develop new capability, make sure to include any additional NAICS codes in SAM/DSBS and your business plan.

NAICS Code	Primary or Secondary?	Past Experience

## SECTION II.

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**STAFFING**—Provide an outline of current staff/leadership. Use an organizational chart to lay out who's in charge of what in your company. Show how each person's unique experience will contribute to the success of your venture. Identify key members of your team and consider including their resumes. Be sure to include a succession plan for the business ownership.

5

**STAFFING**—Identify staff that will engage in business development (specifically, business development and marketing around government contracting).

6

**CAPACITY**—What size/scope of contract can the business manage currently?

7

**STAFFING**—How does the business plan to scale its workforce to pursue larger contracts?

8

**CAPITAL**—How is the business capitalized? If your business is already established, include income statements, balance sheets, and cash flow statements for the last 3–5 years.

9

**CAPITAL**—Does the business have adequate access to capital to meet its short-term (12 months) and long-term (3+ years) needs and goals? Provide a prospective financial outlook for the next 3 years. Include forecasted income statements, cash flow statements, and capital expenditure budgets. For the first year, be even more specific and use quarterly—or even monthly—projections. Make sure to clearly explain your projections and match them to your funding requests.



## SECTION II.

**10**

**CAPITAL**—Are you bonded (if applicable)? If yes:

- a. Describe your company’s current bonding capacity (single job or aggregate) and source: \_\_\_\_\_
- b. Is the source corporate or individual surety? \_\_\_\_\_
- c. (If individual surety): has surety ever been accepted by a federal agency on a government contract? \_\_\_\_\_
- d. Are you required to have third-party indemnification on corporate bonds or an SBA guarantee? \_\_\_\_\_
- e. What are the bonding limits? \_\_\_\_\_
- f. Are these limits adequate to meet your short-term contracting goals?  
\_\_\_\_\_

**11**

**CAPITAL**—List any major operating equipment that your company owns or leases to perform on federal contracts.

Quantity	Description	Age (Years)	Condition	(Check one)		(If owned): Cost
				Owned	Leased	



## SECTION II.

**12**

**EXTERNAL SUPPORT**—Do you have an existing mentor relationship or joint ventures? If so, explain.

**13**

**EXTERNAL SUPPORT**—What (if any) other resources do you currently utilize (e.g., Small Business Development Center, SCORE, Procurement Technical Assistance Center, Women’s Business Center, Veteran Business Outreach Center)?



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## SECTION III.

# Government Contracting Goals



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## Government Contracting Goals

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**GOVERNMENT CONTRACTING GOALS**—Describe the firm’s short-term (12 months) and long-term (5+ years) goals and objectives around government contracting (including, but not limited to, the 8(a) Business Development Program).

15

**GOVERNMENT CONTRACTING GOALS**—What personal goals and objectives do you hope to achieve through participating in the 8(a) Business Development Program (e.g., leveraging the program to increase subject matter expertise through 7(j) and other training, pursuing joint ventures, etc.)?

16

**GOVERNMENT CONTRACTING GOALS**—In what geographic area is the firm capable of performing contracts?

17

**CONTRACT SUPPORT TARGETS**—Forecast the aggregate dollar value of contracts to be sought under the 8(a) program and non-8(a) competitive basis for the next program year and the succeeding program year. The forecast should be realistic and based on your management, technical, and financial capability. Keep in mind that your company cannot rely totally on 8(a) contract support.

	Program Year	Program Year
8(a) Support		
Non 8(a) Support		
Total Support		



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## SECTION IV. Market Research



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# Market Research

**18**

**MARKET RESEARCH**—Describe the current federal market for your product/service.

**19**

**MARKET RESEARCH**—To which agencies will you market your firm’s products/ services as an 8(a) BD Program participant? What products/services will you market to them?

Agency	Products/services your firm will market to the agency	Business(es) from which the agency is currently purchasing these products/ services	Are they a small business? (Circle one)
			Y/N
			Y/N
			Y/N
			Y/N
			Y/N
			Y/N

## SECTION IV.

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**MARKET RESEARCH**—Who are your primary competitors for federal contracts? What advantages/disadvantages does your business have compared to its primary competitors?

Primary Competitor	(If known): Federal Agency/ Contract	Your Firm's Advantages	Your Firm's Disadvantages	Competitor Size/ Socioeconomic Category (i.e. SDVOSB, WOSB, SDB, etc.)





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## SECTION V.

### **Self-Assessment: Strengths, Weaknesses, Opportunities, and Threats (SWOT)**



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## Self-Assessment: Strengths, Weaknesses, Opportunities, and Threats (SWOT)

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**SELF-ASSESSMENT/SWOT**—What are the firm’s strengths?

**22**

**SELF-ASSESSMENT/SWOT**—What are the firm’s weaknesses?

**23**

**SELF-ASSESSMENT/SWOT**—What are the firm’s opportunities?

**24**

**SELF-ASSESSMENT/SWOT**—What are the firm’s threats?

**25**

**SELF-ASSESSMENT/SWOT**—What are areas in which the firm has identified it needs assistance (e.g., proposal writing, market research, government accounting practices)?

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## SECTION VI. Signatures

## SECTION VI.

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**SIGNATURES**—Make sure you’ve included all the necessary signatures such as the preparer, president/owner of the company, any partners, and if the firm is a corporation, the corporate seal.

Signature of preparer (if other than 8(a) firm)

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If 8(a) firm is a partnership, all partners sign below.

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By:

Date:

---

By:

Date:

---

By:

Date:

If 8(a) firm is a corporation, affix seal.

Corporate Seal

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By: President’s Signature