

# Coffee Shop Business Plan Template



(Coffee Shop Name)

(Company Name)  
(Street Address)  
(City, State, Zip Code)  
(Creation Date)

Contact Information

(Name)

(Email)

(Phone Number)

(Website)

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# 1.0 Executive Summary

*In the opening paragraphs, discuss the most important aspects of the business plan. The entire executive summary should be less than two pages.*

## 1.1 Business Objectives

*What do you want your coffee shop to achieve? Include at least five objectives. Make specific and actionable.*

## 1.2 Mission Statement

*A brief statement or paragraph describing what your coffee shop stands for.*

## 1.3 Keys to Success

*What are the factors that will make your business a success? Include at least three.*

## 2.0 Company Summary

*Open with a couple of paragraphs describing your coffee shop including important facts, like address, hours, sq. footage.*

### 2.1 Startup Summary

*Briefly, how much will it cost to start your business? Consider creating a chart with each expense.*

### 2.2 Location & Facility

*Where is your business located? What makes the location a benefit? What's the facility like? How will the facility increase your likelihood of success?*

### 2.3 Ownership & Management

*Who are the owners of the coffee shop? What are their backgrounds and why will that make the business a success? What is the management structure like within the coffee shop? Who are the managers?*

## 3.0 Food, Products & Services

*Write a couple paragraphs with a high-level overview describing the drinks, food, and products you intend to sell.*

### 3.1 Product Description

*What types of coffee drinks will be served? What other food products or merchandise will your coffee shop sell?*

### 3.2 Daily Operations and Production

*What are the day-to-day operations and systems that make your coffee shop operate? Who will take care of tasks like inventory management, tip payout, cleaning, and opening the shop?*

### 3.3 Pricing and Profitability

*What is the price of every item on the menu and how much will you make on a sale? Create a chart.*

## 4.0 Market & Industry Analysis Summary

*Describe the industry your coffee shop is in. What are the trends? It is predicted to be a growing or shrinking market?*

### 4.1 Market Segmentation

*Who are the types of customers that will visit your coffee shop? Use data to explain their purchasing habits and how many are in your area.*

### 4.2 Target Market Segment Strategy

*How will you reach your different segments of customers? How will you communicate to them?*

### 4.3 Main Competitors

*Who are your main competitors within a five mile radius? List at least five. Include a chart with details like distance, description, advantages and disadvantages.*

## 5.0 Marketing Strategy & Implementation Summary

*Give a high level overview of your marketing strategy and how it will be implemented.*

### 5.1 Competitive Advantage

*What will you do better than competing coffee shops?*

### 5.2 Marketing Strategy & Positioning

*What are your strategies to market your business? Additionally, how will you communicate your coffee shop in a 30-second positioning statement?*

### 5.3 Traditional Marketing & Advertising

*What type of physical marketing and advertising will you do? Where will the materials be made?*

### 5.4 Online Marketing & Advertising

*What online marketing and advertising will you do? Who will manage it?*

### 5.5 Sales Strategy & Forecast

*What are your sales, costs, and profits forecast for the first three years? Create a chart.*

### 5.6 Coffee Shop Milestones

*What are the main milestones you need to reach before opening your business? Have at least eight.*

## 6.0 Financial Plan & Projections

*What are the assumptions you made about the economy and your coffee shop for the financial projections below?*

Use this [financial projections worksheet \(https://www.score.org/resource/financial-projections-template\)](https://www.score.org/resource/financial-projections-template) as a guide to the sections below. Ideally, turn the projections into charts for investors and bankers to more easily understand the numbers.

### 6.1 Startup Costs

*How much money will it require to open the shop? List the expenses and include cost.*



## 6.2 Break-even Analysis

*At what point in sales will the business operate at a profit?*

## 6.3 Projected Profit & Loss

*What are the income and expenses in the coffee shop and at what month will it operate at a profit?*

## 6.4 Projected Cash Flow

*How much cash is coming into and going out of the shop by month?*

## 6.5 Projected Balance Sheet

*What are projected assets and liabilities of the business for the next three years?*

## 6.6 Business Ratios

*What are the business ratios at the end of year one, two and three?*

## 7.0 Appendix

*Include additional documentation to support the business plan. Include any visual documentation, like a floor plan or artist rendering. It's recommended to include a sample menu.*