

2. COMPANY OVERVIEW

The Company Overview is a brief summary of the intended business, including what it uniquely delivers, the mission, how it got started, market positioning, operational structure, and financial goals. After reviewing this section, the reader should have a broad understanding of what the business is setting out to do and how it is organized.

This section is not meant to be lengthy. Keep it short and succinct. This is the snapshot of the business. The type of business will determine what of the following sections will be required for the business plan. Only include what is needed to properly represent the business and remove anything else.

- **Company summary:** This is the introductory section to the company, also known as the ‘elevator pitch’ of what the company stands for and is setting out to do. Include the company’s goals and some of the near-term objectives.
- **Mission statement:** This is a concise statement on the guiding principles of the company and what the company aims to do for customers, employees, owners, and other stakeholders.
- **Company history:** This provides the back story, especially the personal story, of why the business was founded. Use this section to give the overarching history of the company from its start and bring the reader up-to-date on where the company is now in terms of sales, profits, key services, and customers.
- **Markets and services:** This outlines the target market and related needs that the company will address. Include brief descriptions of offered services and targeted markets and customer types. This section can be a general overview as more details will be suggested in a later section of this plan.
- **Operational structure:** This describes the operational details of the business. List any potential employees needed on the payroll to make the business run.
- **Financial goals:** This describes the start-up capital needed, projected revenue and profits, forecast, and budget of the business.