

COFFEE SHOP BUSINESS PLAN

(Coffee Shop Name)

(Company Name)

(Street Address)

(City, State, Zip Code)

(Creation Date)

Contact Information

(Name)

(Email)

(Phone Number)

(Website)

Table of Contents

[Table of Contents](#)

[1.0 Executive Summary](#)

[1.1 Business Objectives](#)

[1.2 Keys to Success](#)

[2.0 Business Description](#)

[2.1 Startup Cost Summary](#)

[2.2 Sample Menu](#)

[2.3 Location & Facility](#)

[2.4 Ownership & Management Profiles](#)

[3.0 Food, Products & Services](#)

[3.1 Product Description](#)

[3.2 Daily Operations and Production](#)

[3.3 Pricing and Profitability](#)

[4.0 Market & Industry Analysis Summary](#)

[4.1 Market Segmentation](#)

[4.2 Target Market Segment Strategy](#)

[4.3 Main Competitors](#)

[5.0 Marketing Strategy](#)

[5.1 Competitive Advantage](#)

[5.2 Marketing Strategy & Positioning](#)

[5.3 Traditional Marketing & Advertising](#)

[5.4 Online Marketing & Advertising](#)

[5.5 Sales Strategy & Forecast](#)

[5.6 Coffee Shop Milestones](#)

[6.0 Financial Plan & Projections](#)

[6.1 Startup Costs](#)

[6.2 Break-even Analysis](#)

[6.3 Projected Profit & Loss](#)

[6.4 Projected Cash Flow](#)

[6.5 Projected Balance Sheet](#)

1.0 Executive Summary

This one-page section should summarize the entire business plan. Be descriptive here; you want bank loan officers or potential investors to keep reading. It's a good idea to write this section last.

1.1 Business Objectives

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

1.2 Keys to Success

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

2.0 Business Description

Open with a few paragraphs describing your coffee shop, including essential facts like name, address, hours of operation, square footage, and enticing details about your proposed location.

2.1 Startup Cost Summary

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

2.2 Sample Menu

Include a sample menu of your food and beverage offerings here. Include a few mouthwatering images of your food or beverages if you have them.

2.3 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? List leasing details and a floor plan if you have them.

2.4 Ownership & Management Profiles

Who is the owner of the coffee shop? What is the management structure of the coffee shop? Who are the managers? Focus on your principals' experience. If you are working with an experienced consultant (possibly from your wholesale roaster?), list them.

3.0 Food, Products & Services

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

3.1 Product Description

This is a deeper look at your complete product line and all of your revenue streams. What types of coffee drinks will you serve? What other food products or merchandise will your coffee shop sell? If you plan to roast your own beans, mention that here. If you plan to partner with a specific wholesale roaster, include details.

3.2 Daily Operations and Production

What are the day-to-day operations and systems that make your coffee shop operate? Who will handle 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 coffee industry in your location. Is it predicted to be a growing or shrinking market? What are the trends?

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

Give a high-level overview of your marketing strategy and how you will implement it.

5.1 Competitive Advantage

What will you do better than competing coffee shops?

5.2 Marketing Strategy & Positioning

What are your strategies for marketing your business? 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 assumptions have you made about the economy and your coffee shop for the financial projections below?

Use this [financial projections worksheet](#) from SCORE– a network of volunteer business mentors affiliated with the Small Business Administration– as a guide to the sections below. Ideally, turn the projections into charts for investors and bankers to understand the numbers more easily.

6.1 Startup Costs

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

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 of the coffee shop, and in 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

List the projected assets (cash, equipment, and product inventory) and liabilities (accounts payable and long-term debt) of the business for the next three years in a spreadsheet format. The [SCORE website](#) has an excellent template.

7.0 Appendix

Include any additional documentation to support the business plan. If you have more visual documentation, like artist renderings of your finished shop, your proposed website design, proposed furnishings, and equipment include them here.