

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.