

Consulting Business Plan

Sample plan for Summit Advisory Partners (fictional example)

Prepared by: [Owner name]

[Business address]

[Phone] | [Email] | [Website]

Date: [Month, Year]

How to use this sample: the business name, figures and descriptions are a fictional example to show what a finished plan looks like. Replace everything in [brackets] and every example number with your own research before you share it. Cost ranges are rough planning figures and vary widely by location.

1. Executive Summary

Summit Advisory Partners is a new consulting business based in [City, State]. We will serve small and mid-sized businesses and startups needing fractional expertise, offering strategy and planning projects, fractional executive services and workshops and training. Our goal is to become the go-to choice for [your target customer] in [your area] by [your key difference, such as quality, speed, price or specialty].

We project first-year revenue of about \$180,000, growing to \$259,000 by year three. Startup costs are estimated between \$9,800 and \$44,500. We are seeking \$27,000 in [loan / investment / owner funds] to cover startup costs and working capital. [Add one or two sentences on the owner's experience and any early traction such as signed customers, pre-orders or a secured location.]

2. Company Description

Consulting plans are short on equipment and long on positioning. Explain the problem you solve, who pays for it, how you price (hourly, project or retainer), and how you will build a pipeline beyond your existing network.

Item	Details
Legal name	[Summit Advisory Partners LLC]
Legal structure	[LLC / sole proprietorship / corporation / partnership]
Location	[Address or service area]
Owners	[Names and ownership %]
Stage	[Idea / pre-launch / operating since 20XX]

Mission statement

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3. Products and Services

Offering	Description	Price	Cost to deliver
Strategy and planning projects	[Describe]	[\$]	[\$]
Fractional executive services	[Describe]	[\$]	[\$]
Workshops and training	[Describe]	[\$]	[\$]
Retainer advisory	[Describe]	[\$]	[\$]

Revenue streams:

- Project fees
- Monthly retainers
- Training and speaking

4. Market Analysis

Target customers:

- Small and mid-sized businesses
- Startups needing fractional expertise
- Nonprofits
- Larger firms needing subcontract help

Market	Estimate	Source
Potential customers in our area	[#]	[Census data, local reports]
Customers we can realistically reach	[#]	
Target share in year one	[%]	

Industry trends affecting our business

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5. Competition

Competitor	Strengths	Weaknesses	Price range
[Competitor 1]			
[Competitor 2]			
[Competitor 3]			

Why customers will choose us

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6. Marketing and Sales

Planned marketing activities:

- Case studies and thought leadership
- LinkedIn content
- Referral partnerships with accountants and attorneys
- Speaking at industry events

Channel	Monthly budget	Goal
Case ...	[\$]	[#]
LinkedIn ...	[\$]	[#]
Referral ...	[\$]	[#]

7. Operations

Location, facilities and equipment

Suppliers and day-to-day operations

Licenses, permits and insurance to obtain:

- Business registration [] obtained
- Professional licenses if in regulated fields [] obtained
- Professional liability insurance [] obtained

Requirements vary by state and city. Confirm with your local licensing office.

8. Management and Staffing

Name	Role	Experience
[Owner name]	Owner / manager	[Relevant experience]

Hiring plan for the first three years

9. Key Performance Indicators

Metric	Why it matters	Our target
Utilization rate	Billable hours as a share of available hours.	[Target]
Average project value	Revenue per engagement.	[Target]
Pipeline value	Expected value of proposals outstanding.	[Target]
Client retention	Repeat and retainer clients.	[Target]

10. Risks and How We Will Manage Them

Risk	How we will reduce it
Reliance on a few clients	[Your plan]
Long sales cycles	[Your plan]
Founder time limits growth	[Your plan]
Scope creep	[Your plan]

11. Financial Plan

Estimated startup costs

Startup cost	Typical low	Typical high	Our estimate
Website and branding	\$1,000	\$6,000	[\$]
Laptop and software	\$1,500	\$5,000	[\$]
Business registration and legal	\$500	\$2,500	[\$]
Professional liability insurance	\$800	\$3,000	[\$]
Marketing and networking	\$1,000	\$8,000	[\$]
Working capital reserve	\$5,000	\$20,000	[\$]
Total	\$9,800	\$44,500	[\$]

Three-year projection (illustrative)

	Year 1	Year 2	Year 3
Revenue	\$180,000	\$225,000	\$259,000
Cost of sales	\$27,000	\$33,750	\$38,850
Gross profit	\$153,000	\$191,250	\$220,150
Operating expenses	\$145,350	\$159,885	\$172,676
Net income before tax	\$7,650	\$31,365	\$47,474

Example assumptions: 85% gross margin, revenue growth of 25% in year two and 15% in year three. Replace these with your own numbers. Our free Excel financial projections template at BusinessPlanDownload.net builds this table from your assumptions.

12. Funding Request

We are requesting \$27,000 to fund startup costs and working capital. [Explain loan term or investor terms, how much the owners are investing, and how the funds will be repaid.]

Use of funds	Amount
Website and branding	[\$]
Laptop and software	[\$]
Business registration and legal	[\$]
Professional liability insurance	[\$]
Marketing and networking	[\$]
Working capital reserve	[\$]

Appendix

Writing tips for a consulting plan:

- Define your niche narrowly.
- Show pricing for each offer.
- Forecast revenue from the pipeline, not hope.

Attach: owner resumes, lease or letter of intent, equipment quotes, permits, market research, photos and detailed financial statements.