FREE RESOURCE · SOUNDVIEW MARKETING GROUP

# The Long Island Small Business Plan

A working business plan built for owners who need something real to hand a lender, a partner, or a new hire, not a term paper that sits in a drawer.

> *How to use this workbook: work through it in order, but don't let any one section stall you. Write a rough answer, move to the next page, and come back to sharpen it later. A plan that's 80% done and in use beats a perfect plan that never gets finished.*

## What's inside

## 1. Executive Summary

Write this section last, even though it comes first. It's a one-page snapshot of everything else in this plan, and it's the only section most lenders, partners, or investors will read closely.

### Business Name & Location

---

### What You Do (one or two sentences)

---

### Who You Serve

---

### What Makes You Different

---

### Where the Business Is Today

---

### Where You Want It to Be in 3 Years

---

### What You're Asking For (if seeking financing or a partner)

---

SOUNDVIEW MARKETING GROUP

## 2. Company Description

This section gives context. Someone reading only this page should understand what the business is, why it exists, and how it's structured.

### Business Structure (LLC, S-Corp, sole proprietor, etc.)

### History (when founded, key milestones)

### Mission — Why This Business Exists

### Legal & Licensing (licenses, insurance, certifications required for your industry)

### Location(s) & Service Area

Long Island businesses should be specific here. "Nassau and Suffolk Counties" is different from "North Shore only" or "within 20 minutes of our shop," and that specificity matters for both operations and marketing.

## 3. Market Analysis

This is where you show you understand who you're selling to and why now is the right time. Long Island's market has real local texture, seasonality, commuting patterns, second-home and shore-town swings, dense competition in some towns and gaps in others. Use that instead of writing around it.

### Target Customer Profile

**Who are they (homeowner, business type, age range, etc.):**

**What problem do they have that you solve:**

**Where do they currently go for this (competitor, DIY, nothing):**

**What do they care about most when choosing (price, speed, trust, reviews):**

### Market Size & Trends

You don't need a formal market research report. A reasonable estimate, backed by something concrete (town population, number of households, local permit data, industry association numbers), is usually enough.

### Seasonality

Most Long Island service and retail businesses have a real seasonal pattern. Naming it here, and planning around it later in this workbook, is more useful than treating every month as the same.

## 4. Competitive Analysis

List your three or four real, named competitors, not a vague category. Knowing exactly who a customer is choosing you over is what makes the marketing plan in the next section specific instead of generic.

| Competitor | Location | Strength | Weakness | How You Win |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

*Tip: if you genuinely can't name a weakness for a competitor, you haven't looked closely enough yet. Check their reviews, their website, and ask a recent customer why they chose you over the alternative.*

### Your Unfair Advantage

Not "we care more" or "we do quality work," every competitor claims that. What's actually structurally different: a specialty, a guarantee, a relationship, a process, a location, a price position?

## 5. Marketing & Sales Plan

This section answers one question: how does a stranger become a customer? Walk it step by step.

### How Customers Find You Today

### Primary Marketing Channels (rank by importance)

1.
2.
3.

### What Happens After Someone Finds You (the path from inquiry to sale)

Example: sees Google Business Profile → calls or fills out a form → gets a quote within 24 hours → follow-up call → signed job. Write your actual version, including where leads currently fall through the cracks.

### Pricing Strategy (brief — details go in the Financial Plan)

### How You'll Generate & Use Reviews

## 6. Operations Plan

This is the day-to-day mechanics: how the work actually gets delivered once a customer says yes.

### Core Products or Services (list each one)

- 
- 
- 

### Key Suppliers or Vendors

---

### Equipment & Facilities Needed

---

### Quality Control (how you make sure the work is done right, consistently)

---

### Key Processes Documented (or that need to be — see the Soundview SOP Master Binder for a full template)

- 
- 
- 

## 7. Management & Team

Even a solo operation should fill this out, because it forces the question every plan eventually has to answer: what happens if you're out sick, on vacation, or ready to step back?

| Name / Role | Responsibilities | Background / Why Them |
| --- | --- | --- |
| | | |
| | | |
| | | |

### Current Gaps (roles you know you need but haven't filled)

### Advisors (accountant, attorney, insurance agent, mentor)

## 8. Financial Plan & Projections

You don't need to be an accountant to fill this out usefully. Rough, honest numbers you'll revisit beat precise-looking numbers you made up to fill the page. Work with your accountant or bookkeeper to sharpen these once the first draft exists.

### Startup or Expansion Costs (skip if not applicable)

| Startup Cost Category | Estimated Amount |
|---|---|
| Equipment | |
| Licenses & Insurance | |
| Initial Marketing | |
| Working Capital Reserve | |
| Other | |
| Total Startup Cost | |

### Revenue Projections

| Revenue Source | Year 1 | Year 2 | Year 3 | Notes |
|---|---|---|---|---|
| Product / Service Line | | | | |
| | | | | |
| | | | | |
| Total | | | | |

### Break-Even Estimate

Fixed monthly costs (rent, insurance, base payroll, loan payments) ÷ average profit margin per sale = revenue needed to break even each month.

**Fixed Monthly Costs: $**

**Average Profit Margin per Sale: %**

**Monthly Break-Even Revenue: $**

---

### Funding Needs (if applicable)

**Amount Needed: $**

**What It's For:**

**Source (loan, investor, owner capital, grant):**

---

> *Related resource: pair this section with the Soundview 13-Week Cash Flow Forecast Template for ongoing tracking.*

## 9. Appendix & Notes

Use this space for anything that supports the plan but didn't fit above: licenses, resumes, letters of reference, a more detailed org chart, photos of the work, or your own notes to revisit each quarter.

**Next step**

A written plan is a starting point, not a finish line. Soundview Marketing Group helps Long Island business owners turn a plan like this into the marketing systems that actually execute it, so it becomes what the business does next instead of a document that sits in a drawer.

**Get Your Free Growth Plan → soundviewmarketinggroup.com/free-growth-plan**