

THE SHOPIFY TOOLKIT

Business Plan Templates



What is a business plan—and why is it important?

Business plans outline the goals and objectives of a business, as well as the strategies and action plans for achieving those goals. Writing a business plan is invaluable for any business, whether it's a small startup or a large corporation, and whether it's only for internal purposes or for interested investors.

A business plan does the following:

- Helps you define the goals and objectives of your business, as well as the strategies and action plans for achieving those goals. This gives your business a sense of direction and purpose.
- Supports you in finding potential obstacles and challenges and gives you the framework to develop strategies to overcome them.
- Gives you the resources to attract investors and secure funding.
- Keeps you organized and focused by using a business plan as a guide.
- Helps you monitor your progress and make necessary adjustments to your strategies and action plans.

How to use this template:

Below are two customizable templates for developing your business plan—one for a standard business plan, and one for a lean business plan. After you decide on a format, read through it to understand what is typically included in a business plan. Then, determine which sections of the template are best for your business and fill in the blanks. It's recommended you make a copy of this document so you can have one for reference and use the other as your company's business plan.

Share your completed plan with potential investors, company leadership, or anyone else who needs to see it. This template is designed to fit your company, so feel free to add or omit sections as needed.

Each section of the business plan template includes:

- A definition of the section
- Ideas for what to include when writing each section
- An example to use as inspiration

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Business Plan Template



LOGO

To add your logo,
right-click on this
box to replace
the image

[Your Business's Name]

[Your Business's Address]

[Your Business's Phone Number]

Prepared by: [Your Name], [Your Role]
[Your Email Address]

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Executive summary

What is an executive summary?

An executive summary offers a high-level overview of your business plan and should grab the reader's attention. It is concise and provides the reader with the key points of the plan.

HINT

Fill out this section of your business plan last.
It's easier to work through the rest of your plan using this template, then come back to the executive summary.

Here's what to include in your executive summary:

- **Product overview.** Give a brief explanation of what you're selling.
- **Target market.** Who will you sell your products to?
- **Competitive advantage.** Explain what you have that competitors don't.
- **Leadership structure.** Explain who will run your company.
- **Mission statement.** Explains the purpose of your company and why it exists.
- **High-level financial and growth plans.** Give an overview of your current sales and profits, financial projections, and what funding you hope to receive, and how you expect your company to grow.

Executive summary example

Providence Tea Company is a sustainable, socially conscious tea retailer that sources and sells high-quality, ethically sourced tea from small farms in India. Our mission is to support small local farmers and promote sustainable agriculture practices in the tea industry. We are one of the few organic specialty tea companies focused on sustainability, setting us apart from our competitors.

We offer a curated selection of premium teas, sourced from sustainable farms across India. Our teas are carefully hand-blended and packaged in elegant, eco-friendly packaging.

Providence Tea Company will be the go-to source for sustainable, premium tea, and has a strong and loyal customer base. With every purchase, we invest in employment opportunities, infrastructure, and education in order to combat poverty and promote sustainable growth for the communities we are a part of.

Discerning tea lovers who look for premium, high-quality teas and tea accessories make up our target market. They are health-conscious and environmentally conscious individuals who value sustainability and quality. Our marketing efforts focus on building a strong online presence and passionate community. Social media and influencer marketing are how we reach our target audience.

We seek investors to help grow our business and expand our customer base. In the next year, we project revenue of \$3 million and a net profit of \$550,000. We plan to invest in new retail locations, increase our online presence, and continue to source the best tea from India.

Our unique approach to sourcing and selling tea, combined with our experienced team, makes us well positioned for success.

Company overview

What is a company overview?

This section of your business plan will answer two fundamental questions: “Who are you?” and “What do you plan to do?” Answering these questions clarifies why your company exists, what sets it apart from others, and why it’s a good investment opportunity for others.

Even if you are the only person who ever sees this section of the plan, writing it will spell out intangible aspects of your business, solidifying your principles, ideals, and cultural philosophies.

This section will detail the reasons for your business’s existence, its goals, and its guiding principles. Developing these statements may require some thought and reflection, but are essential to understanding your business’s purpose and direction.

Here’s what to include in your company overview:

- **Name.** Introduce your business by name and give any relevant back story on your business name.
- **Location.** Where will your business be based? Will you have satellite offices? Will employees work remotely? Where will you do business?
- **Structure.** Note your legal structure. For example, are you set up as a partnership? A C corp?
- **Business concept, model, and industry.** Briefly explain what your business does, what its sales model is, and what industry it fits into.
- **Competitive advantage.** Briefly state what you have that competitors don’t.
- **Mission and values.** Identify your [brand values](#) and include a [mission statement](#) explaining the impact you want your company to have.
- **Business objectives.** Name your goals for the short-term (in the next year) and long-term (in the next one to five years).
- **Leadership, management, and employees.** What leadership, management, and staff roles will you fill, and what are the responsibilities of each role? How might the team grow over time? Note your company’s [organizational structure](#) and include an org chart, if you have one.

Company overview example

Providence Tea Company is a sustainable, socially conscious tea retailer that sources and sells high-quality, ethically sourced tea from small farms in India. Our purpose is to provide our customers with delicious, sustainably sourced organic tea while making a positive impact on the world. Our mission is to support small local farmers and promote sustainable agriculture practices in the tea industry.

The business focuses on increasing awareness about the importance of sustainability in the tea industry while offering a wide range of sustainably sourced tea products. We will develop strong relationships with our suppliers and customers to continually improve our sustainability practices.

We offer a variety of teas, including black, green, and herbal teas in eco-friendly packaging, including biodegradable tea bags and reusable tins.

Our main competitive advantage is our unique relationship with farmers, which makes it possible to support sustainable practices while maintaining a competitive price point. We are dedicated to reducing our environmental impact throughout the tea industry. Our loyal customer base and strong brand recognition bolsters our edge in the market. Providence Tea Company is made up of experts and sustainability professionals in India and Rhode Island, USA, with a combined 30 years in the tea industry. Our flat organizational structure allows for open communication and collaboration among team members. This structure enables us to be agile and responsive to the needs of our customers and the changing tea industry.

Products or services offered

This section goes into detail on your products or services. Explain what you plan to sell, and list your products' most important features.

Here's what to include in your services offered section:

Features and benefits of your offering

- Include information about your product lines or provide more detailed information on individual products if you only offer a few.

Information about your pricing model

- Explain why your prices make sense given market trends, customer preferences, your business costs, and your company's goals. If your products are more expensive than competitors', you'll need to justify why by listing the specific costs that elevate their prices.

Plans to protect your intellectual property

- Such as patents, trademarks, and copyrights, if applicable.

Product or services offered example

Providence Tea Company's product line of sustainably sourced teas includes:

- **Organic Darjeeling black tea:** Grown in the high elevations of the Darjeeling region in India, and known for its delicate, floral flavor.
- **Fair-trade Assam black tea:** Grown in the lowland region of Assam, India, known for its strong, malty flavor.
- **Organic Nilgiri green tea:** Grown in the Nilgiri mountains of southern India, known for its light, fresh flavor.
- **Sustainable chai blend:** Combines organic black tea with spices like cinnamon, cardamom, and ginger, and is a popular drink in India.
- **Herbal tea blends:** Made with sustainably sourced ingredients like lemongrass, peppermint, and chamomile.

We keep our tea competitively priced while paying everyone in our supply chain a fair working wage.

Our organic teas cost more than conventionally grown teas, due to the added costs of sustainable practices, such as fair trade labor and organic certification. The eco-friendly packaging we use for tea is made of biodegradable tea bags and reusable tins. Our price takes into account:

- **The cost of organic certification.** In order for a tea to be labeled as organic, it must be grown and processed according to strict guidelines. The cost of organic certification can vary, but it is around \$500 to \$1,000 per year for a small tea farm.
- **The cost of fair trade certification.** If the tea is also fair trade certified, this adds an additional cost. Fair trade certification ensures tea workers receive fair wages and good working conditions. The cost of fair trade certification can vary, but it may be around \$500 to \$1,000 per year for a small tea farm.
- **The cost of production.** Production costs include the cost of labor, materials, and other expenses related to growing and processing the tea. The average cost of production for our small farm grower is on average 30¢ per pound of tea.

Based on these factors, the price for our high-quality, organic, sustainable tea is around \$5 to \$9 per ounce, depending on the type of tea.

Market analysis

What is a market analysis?

A market analysis is a study of the current market conditions for a particular product or service.

Start by researching and analyzing market size, competition, and trends in order to understand the opportunities and challenges for a business in that market. This identifies potential customers, understands their needs, and develops strategies to compete in the market.

Your market analysis should include:

- **Industry outlook.** Use [market research](#) to describe industry-wide trends. For example, is your industry expected to grow over the next five or 10 years? By how much? How will industry-wide trends affect your business?
- **[Target market.](#)** Get into the details of your target market with:
 - **Demographic information:** Age, gender, geographic location, educational background, and socioeconomic status
 - **Purchasing habits:** How often your target market buys your type of product and what similar products they currently buy
 - **Decision-drivers:** Pain points, interests, needs, values, and goals
- **[Competitive analysis.](#)** Identify your competitors, then analyze their products, pricing, marketing strategies, distribution channels, and customer base. Use this information to identify their strengths and weaknesses.
- **[SWOT analysis.](#)** List your company's strengths, weaknesses, opportunities, and threats (SWOT).

Market analysis example

Industry outlook

The global market for at-home tea is valued at \$144.69 billion in 2025, and it's expected to grow at a compound annual growth rate (CAGR) of 5.57% through 2029. Our market analysis indicates there is strong demand for sustainable, ethically farmed tea among socially and environmentally conscious consumers, and that the market is growing. By targeting this market and offering sustainably sourced organic tea products, we can meet this demand and grow our business.

Target market

Providence Tea Company's target market is the health-conscious and environmentally conscious consumer. They are looking for high-quality, sustainably sourced organic tea. These people are professional young adults and health enthusiasts. Our target market:

- Buys organic tea from competitor brands to drink at home at least once per day
- Is concerned about the impact of conventional tea farming on the environment and passionate about supporting farms that offer fair wages
- Is passionate about supporting small businesses over large corporations
- Is committed to buying only fair trade and organic tea, and willing to pay a premium for these features
- Is interested in the health benefits of tea

Our target market is primarily made up of young US adults, with a median age of 25 to 34 years.

This group is evenly split between men and women and has a median household income of \$100,000 to \$125,000. The target market is also highly educated, with a majority having a college degree or higher.

Competitive analysis

Competition in the sustainable tea market comes from three types of sellers:

1. **Large, established tea brands:** With significant market share and a wide range of tea products, including organic and fair trade options, these companies operate with an economy of scale and offer low prices. They do not have relationships with small farms, favoring larger ones instead.
2. **Specialty tea shops:** With a focus on high-quality, specialty teas, including organic and fair trade options, they typically have a loyal customer base, and may offer a more personalized shopping experience. However, their products are often more expensive than comparable ones sold online.
3. **Other sustainable ecommerce tea companies:** They offer products similar to ours and share similar values surrounding sustainability and ethical farming practices. They may also have similar target markets and marketing strategies.

SWOT analysis

Strengths • Knowledgeable and experienced team offering top-notch customer service • Strong relationships with small farms • Unique and differentiated packaging	Weaknesses • Limited product line • Small market share • Limited resources for marketing and advertising • Competing with larger, established tea brands offering less expensive products, and comparable companies offering similar products at similar prices
Opportunities • Growing market for at-home and sustainable tea • Increasing consumer awareness about sustainability • Potential partnerships with other sustainable businesses • Opportunities to expand our product line and enter new markets, like coffee	Threats • Changing consumer preferences • New competitors • Regulatory challenges • Maintaining sustainability practices • Third-party uncertainty (shipping, packaging solutions)

Marketing plan

What is a marketing plan?

A marketing plan details marketing strategies and tactics your business will use to achieve its audience awareness and sales goals.

Developing a marketing plan will help you do the following:

- Understand your business's target market and the needs and preferences of your customers
- Identify unique selling points of your products or services, and develop marketing messages to highlight those points.
- Develop a clear and effective marketing strategy aligned with your business's goals and objectives
- Set specific, measurable, achievable, relevant, and time-bound goals and objectives (SMART)
- Allocate resources, such as budget and personnel, to impactful marketing activities
- Track and measure the effectiveness of your marketing plan, and make needed adjustments

Here's what to include in your marketing plan:

- **Product positioning.** A concise explanation of your product's [value proposition](#) to your target market, how you want your target market to think and feel about your product, and how your product fits within its competitors.
- **Brand messaging.** The language and selling points you'll use to market your products.
- **Acquisition channels and tactics.** Where and how you'll attract new potential customers (like on social media or in online magazines through press coverage).
- **Marketing tools.** The technologies you'll need to execute your [marketing strategy](#) (like email marketing software or social media management tools).
- **Goals and metrics.** The milestones you want to reach (like a certain number of social media followers) and how you'll define marketing success (such as measuring website traffic linked to certain campaigns).

Marketing plan example

Positioning statement

Providence Tea Company's organic and fair trade tea is sustainably grown and harvested. We support fair wages and good working conditions for tea workers. We believe high-quality, organic tea can support the environment, be socially responsible, and taste good, too.

Brand messaging

Providence Tea Company centers its value on sustainable and socially conscious products in all of its external communications. In an approachable yet knowledgeable brand voice, we highlight two key selling points in our marketing materials: the fact that our products are organic and the fact that they are all sourced from small farms.

Acquisition channels and tactics:

- **Paid advertising:** We use Google Ads, Facebook Ads, and Instagram Ads to reach customers interested in sustainable and organic products. Targeted ads reach consumers searching for keywords related to organic tea, sustainable tea, and fair trade tea.
- **Promotions and discounts:** Our team offers promotions and discounts like free shipping, buy-one-get-one-free offers, and limited-time discounts advertised on our website, on our social media channels, and through our email newsletter.
- **Public relations:** We host sustainability focused in-person events at our HQ biannually and partner with other sustainable brands to promote our products.
- **Content marketing:** We create and share valuable and engaging content, like blog posts and videos highlighting the sustainability and ethical sourcing of our tea. Our content educates consumers about the importance of sustainability to build trust and credibility with our target audience.
- **Social media marketing:** We use social media to share information about our products, sustainability practices, and ethical sourcing, and to connect with consumers interested in sustainable products.

Marketing tools

- Providence Tea Company runs both of its ecommerce and physical stores on Shopify so we get a complete view into our sales, revenue, and identify growth opportunities. For marketing purposes, we use:
 - Shopify Forms for email sign-ups
 - Shopify Email for sending newsletters
 - Shopify's segmentation tools to segment our email list
 - Shopify's automation tools to send abandoned browsing and abandoned cart reminders
 - The Shopify integration Smile for our loyalty program
 - Shopify Analytics to track which social media channels drive the most traffic
- We use Google Analytics to measure the impact of our organic blog content and identify website traffic patterns.
- We use Google Ads and Meta Ads to run paid advertising campaigns.

Goals and metrics

- We want to reach 10,000 Instagram followers by the end of the year.
- We want to grow our email list by 20% after the first year.
- We will measure the success of paid ad campaigns through click-through-rate, aiming for 3%.
- We will measure the success of email campaigns through open rate and conversion rate, with goals of a 25% open rate and a conversion rate of 4%.

Logistics and operations

What is a logistics and operations plan?

Logistics and operations plans include details on your business's supply chain, inventory management, production and manufacturing, distribution, and customer service. A well-designed logistics and operations plan helps businesses reduce costs, improve customer satisfaction, and increase competitiveness in the marketplace.

Here's what to include in your logistics and operations plan:

- **Suppliers and manufacturers.** Where will you get your raw materials, and who will manufacture them into your final products?
- **Production.** How will your products be made? Detail the technologies and processes that facilitate manufacture.
- **Inventory management.** Will you store your inventory in your own warehouses or outsource storage to a third-party fulfillment partner? Or will you use a dropshipping model and not store any inventory?
- **Shipping.** Will you ship your products from your warehouses or will a third-party fulfillment partner do this for you? Do you have any special shipping needs, like extra packaging for delicate products?

Logistics and operations plan example

Suppliers and manufacturers

Providence Tea Company sources its tea from organic and fair trade certified farms and cooperatives, located in India. The company has established long-term partnerships and works closely with suppliers to ensure the tea is sustainably grown and harvested, and that fair wages and working conditions are provided to workers.

Production

We process and package our tea at a certified organic and fair trade facility located in India. The facility uses environmentally friendly production methods and provides safe and good working conditions for employees. A range of high-quality, biodegradable materials is used to package our tea, with minimal and reusable packaging to reduce waste.

Inventory management

A cloud-based inventory management system is used to track and manage inventory levels and to ensure we have sufficient stock to meet customer demand. The system allows us to monitor inventory levels in real time, and to generate reports and alerts to help the company make informed decisions about production, ordering, and fulfillment. We operate on a just-in-time inventory approach to minimize waste and ensure inventory is delivered fresh, ready to be brewed.

Shipping

Our company currently uses a combination of direct-to-consumer sales, online marketplaces, and wholesale distributors to distribute and fulfill orders for our tea. We offer a range of carriers, such as UPS, FedEx, and USPS, to deliver our products, and free shipping for all orders over \$30.

Providence Tea Company uses a fulfillment center to manage and coordinate our orders, and provide tracking information and customer support to ensure orders are delivered on time and in perfect condition.

Financial plan

What is a financial plan?

A financial plan outlines your business's income, expenses, and cash flow. It includes details on how your business will generate revenue, manage costs, and invest in growth. A clear financial plan proves your business's financial stability, growth potential, and ability to manage its finances, which can help to secure funding for growth.

When you're just starting out, you'll want to outline the capital you have and your projected income and expenses:

- **Business capital.** Outline the capital you have on hand—for example, any capital you're contributing yourself or from friends and family—and/or the capital you plan to raise.
- **Projected revenue.** Create a projection of the income that will flow into your business (e.g., from sales). If you're just starting up, you'll need to make estimates based on forecasted sales; if you've been in business for some time, you'll use historical data.
- **Projected expenses.** An account of the money you expect to flow out of your business.

To ensure you understand both the short-term and long-term financials of your business, you'll want to create two versions of each of these projections. One will look at the first year, broken down by month and potentially by quarter. The second will look ahead to the five year mark. You'll assemble the latter into a five-year financial projection.

If you've been in business for a while and you're updating your business plan for investors or lenders, you'll also want to include your financial statements.

- **Balance sheet.** A record of your business's assets and liabilities.
- **Cash flow statement.** The cash flowing in and out of your business over a certain time period.
- **Income statement.** Also known as a profit and loss statement, this shows you the company's income and expenditures over a specific period of time.

Infographic

YOUR INFOGRAPHIC HERE

To add your infographic, right-click on this box to replace the image

[Optional: You can use the last page of your business plan to share an infographic or data visualization, like a pie chart, bar chart, or line graph. Your infographic might highlight untapped opportunities in your target demographic or show investors where their contributions will go.]

Lean Business Plan Template



LOGO

To add your logo,
right-click on this
box to replace
the image

[Your Business's Name]

[Your Business's Address]

[Your Business's Phone Number]

Prepared by: [Your Name], [Your Role]
[Your Email Address]

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Executive summary

What is an executive summary?

An executive summary offers a high-level overview of your business plan and should grab the reader's attention. It is concise and provides the reader with the key points of the plan. This section is optional in a lean business plan, since you'll cover its main points elsewhere in your plan.

HINT

Fill out this section of your business plan last. It's easier to work through the rest of your plan using this template, then come back to the executive summary once you've already drafted its main points.

An executive summary in a lean business plan contains less information than one in a traditional business plan. This is the only section of a lean business plan that requires you to write paragraphs, not bullet points. Here's what to include:

- **Company name and brief description.** Quickly introduce your company.
- **Products and services offered.** What do you plan to sell?
- **Business model.** What is your legal business structure, such as an LLC or sole proprietorship?
- **Unique value proposition.** What sets your business apart from competitors?
- **Market trend highlights.** Is your industry growing?
- **Target market.** Who is your ideal customer?

Executive summary example

Providence Tea Company, a registered S corp, is a sustainable, socially conscious tea retailer that sources and sells high-quality, ethically sourced tea from small farms in India. We offer a curated selection of premium teas. Our products are carefully hand-blended and packaged in elegant, eco-friendly packaging.

We are one of the few organic specialty tea companies focused on sustainability, setting us apart from our competitors. We cater to socially conscious US consumers within the growing at-home tea market.

Company overview

What is a company overview?

This section of your business plan will answer two fundamental questions: “Who are you?” and “What do you plan to do?” In a lean business plan, you’ll include the following in your company overview, which you can keep in bullet points:

- **Brief introduction.** Briefly explain what your company does in one or two sentences.
- **Business type.** Your legal business type, like sole proprietorship or LLC.
- **Industry.** The type of market you’re in, like the caffeinated beverage industry or the retail clothing industry.
- **Business objectives.** Key goals you want to reach in the short- and long-term.
- **Team.** The leaders and employees at your business and a brief description of your founder’s background.

Company overview example

Providence Tea Company is a sustainable, socially conscious tea retailer that sources and sells high-quality, ethically sourced tea from small farms in India.

- **Business type:** S corp headed by founder Sara Blake
- **Industry:** At-home tea industry
- **Business objectives**
 - **Short-term:** In the next year, we want to earn revenue of \$3 million and a net profit of \$550,000.
 - **Long-term:** In the next three years, we want to expand our ecommerce business and place our products in major grocery chains like Whole Foods and Hannafords.
- **Team:** Our leadership team includes founder and CEO Sara Blake and CFO Melissa Cat. We have a team of 15 full-time employees and plan to hire contractors as necessary to meet business needs.

Market analysis

What is a market analysis?

A market analysis is a study of the current market conditions for a particular product or service. Start by researching and analyzing market size, competition, and trends in order to understand the opportunities and challenges for a business in that market. This identifies potential customers, understands their needs, and develops strategies to compete in the market. It will also help you determine whether or not your product is viable.

Here's what to include:

- **Market size and growth.** Note the current size of your market and any forecasted growth.
- **Target market.** Describe your target audience.
- **Key competitors.** List your competitors and note their strengths and weaknesses.
- **SWOT analysis.** Conduct a SWOT analysis for your business by listing your company's strengths, weaknesses, opportunities, and threats (SWOT).

Market analysis example

- **Market size and growth.** The at-home tea industry is valued at \$144.69 billion in 2025, and it's expected to grow at a CAGR of 5.57% through 2029.
- **Target market.** Our target audience is made up of socially conscious, college-educated consumers between the ages of 25 and 34.
- **Key competitors:**
 - **Large, established tea brands:** With significant market share and a wide range of tea products, including organic and fair trade options, these companies have strong relationships with suppliers and distributors, and resources to invest in marketing and advertising. They lack the ability to sell hand-crafted, artisanal products.
 - **Specialty tea shops and online retailers:** With a focus on high-quality, specialty teas, including organic and fair trade options, they typically have a loyal customer base, and may offer a more personalized shopping experience. They often charge higher prices for their products due to smaller sales volumes.
 - **Other sustainable tea companies:** May offer similar products and services as our company and have similar sustainability practices and values. They may also have similar target markets and marketing strategies.

- **SWOT analysis:**

Strengths • Knowledgeable and experienced team offering top-notch customer service • Strong relationships with small farms • Unique and differentiated packaging	Weaknesses • Limited product line • Small market share • Limited resources for marketing and advertising • Competing with larger, established tea brands offering less expensive products, and comparable companies offering similar products at similar prices
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Products and services

This section details the products and services you'll offer customers and touches on the customer experience. Include the following:

- **Products and services.** All the products and services you plan to offer, with the key features of each.
- **Pricing model.** Detail your products' prices and explain why they carry those prices.
- **Customer benefit.** Explain how your products benefit customers.

Products and services example

Products

Providence Tea Company's product line of sustainably sourced teas includes:

- **Organic Darjeeling black tea:** Grown in the high elevations of the Darjeeling region in India and known for its delicate, floral flavor.
- **Fair-trade Assam black tea:** Grown in the lowland region of Assam, India, and known for its strong, malty flavor.
- **Organic Nilgiri green tea:** Grown in the Nilgiri mountains of southern India, and known for its light, fresh flavor.
- **Sustainable chai blend:** Combines organic black tea with spices like cinnamon, cardamom, and ginger and is a popular drink in India.
- **Herbal tea blends:** Made with sustainably sourced ingredients like lemongrass, peppermint, and chamomile.

Pricing model

The price for our high-quality, organic, sustainable tea is around \$5 to \$9 per ounce, depending on the type of tea. This is higher than the price for standard tea because it accounts for:

- **The cost of organic certification.** In order for a tea to be labeled as organic, it must be grown and processed according to strict guidelines. The cost of organic certification can vary, but it is around \$500 to \$1,000 per year for a small tea farm.
- **The cost of fair trade certification.** If the tea is also fair trade certified, this adds an additional cost. Fair trade certification ensures tea workers receive fair wages and good working conditions. The cost of fair trade certification can vary, but it may be around \$500 to \$1,000 per year for a small tea farm.
- **The cost of production.** Production costs include the cost of labor, materials, and other expenses related to growing and processing the tea. The average cost of production for our small farm grower is on average 30¢ per pound of tea.
- **Eco-friendly packaging.** We only use biodegradable tea bags and reusable tins to package our tea.

Marketing plan

What is a marketing plan?

Your marketing plan explains how you'll get the word out about your business and convert sales.

Here's what to include:

- **Product.** Explain your product positioning—the benefits of your product to your target market.
- **Promotion.** List your main marketing channels and strategies, like email marketing to announce sales and remind customers of abandoned carts, or social media posts that detail the benefits of your products and tell your brand story.
- **Place.** Explain where customers can purchase your products, like on your ecommerce storefront or at a physical store.

Lean marketing plan example

- **Product:** Our products are one of just a few produced with sustainable and socially conscious business practices, setting them apart from competitors.
- **Promotion:**
 - **Paid advertising:** We use Google Ads, Facebook Ads, and Instagram Ads to reach customers interested in sustainable and organic products. Targeted ads reach consumers searching for keywords related to organic tea, sustainable products, and fair trade.
 - **Promotions and discounts:** Our team offers promotions and discounts like free shipping, buy-one-get-one-free offers, and limited-time discounts advertised on our website, on our social media channels, and through our email newsletter.
 - **Public relations:** We host sustainability focused in-person events at our HQ biannually and partner with other sustainable brands to promote our products.
 - **Content marketing:** We create and share valuable and engaging content, like blog posts and videos highlighting the sustainability and ethical sourcing of our tea. Our content educates consumers about the importance of sustainability to build trust and credibility with our target audience.
 - **Social media marketing:** We also use social media to share information about our products, sustainability practices, and ethical sourcing, and to connect with consumers interested in sustainable products.
- **Place:** Customers can purchase our products on our ecommerce website or in our physical retail stores, on online marketplaces, or through third-party retailers through our wholesale operation.

Logistics and operations plan

What is a logistics and operations plan?

Logistics and operations plans include details on your business's supply chain, inventory management, production and manufacturing, and distribution. Here's what to include:

- **Suppliers and manufacturers.** Details on your suppliers, the products or materials your business will source, and the processes and systems you'll use to manage your supply chain.
- **Production.** Provide information on your business's production facilities, equipment and technology, and processes and systems that will manage production and manufacturing.
- **Shipping.** Explain what distribution channels your business uses, the methods and carriers that will deliver your products, and the processes and systems you will use to manage fulfillment.
- **Inventory management.** Explain where you will store inventory. Note if you won't need to store inventory (if you're using a dropshipping model, for example).

Lean logistics and operations plan example

- **Suppliers:** Organic and fair trade certified farms and cooperatives, located in India.
- **Production and manufacturing:** We process and package our tea at a certified organic and fair trade facility located in India. We use high-quality, biodegradable materials to package our tea.
- **Inventory management:** We use a cloud-based inventory management system to track and manage inventory levels. We use a just-in-time inventory approach to minimize waste and ensure inventory is delivered fresh, ready to be brewed.
- **Distribution and fulfillment:** We sell through direct-to-consumer sales, online marketplaces, and wholesale distributors to distribute and fulfill orders for our tea. We use carriers including UPS, FedEx, and USPS to deliver our products. A fulfillment center manages and coordinates our orders and deliveries.