



# Business Plan Template

## 1. Executive Summary

*(Write this last, but place it first)*

- **Business (Winery) Name:**
- **Business Type:** (Winery, wine brand, importer, tasting room, subscription, etc.)
- **Location(s):**
- **Founders / Ownership:**
- **Product Name:** (if applicable)
- **Product Focus:** (Varietals, region, price tier, style)
- **Target Customer:**
- **Unique Value Proposition:**
- **Revenue Model:**
- **Financial Highlights (3–5 years):**
- **Growth Vision:**

## 2. Company Overview

### Company Description

- Legal structure (LLC, Corp, Partnership)
- Year founded / launch timeline
- Short brand story (why this wine, why now)

### Brand Positioning

- Premium / Ultra-premium / Accessible luxury / Everyday
- Old World vs New World inspiration
- Sustainability, organic, biodynamic, minimal intervention (if applicable)

## 3. Mission, Vision & Values

### Mission Statement

*What you do, for whom, and why it matters.*



Example:

"To craft expressive, approachable wines that bring people together and make everyday moments feel worth celebrating."

## **Vision Statement**

*Where the business is headed long-term.*

Example:

"To become a nationally recognized wine brand known for quality, storytelling, and community."

## **Core Values**

- Quality & Craftsmanship
- Authenticity & Transparency
- Sustainability
- Hospitality & Experience
- Innovation (or Tradition)

## **4. Products & Services**

### **Wine Portfolio**

- Varietals
- Appellations / Regions
- Vintage strategy
- Price points (retail & wholesale)

### **Production Model**

- Estate grown / Sourced grapes
- Custom crush / Estate winery
- Annual case production (current & projected)

### **Additional Revenue Streams**

- Tasting room
- Wine club / subscriptions
- Events & private tastings
- Merchandise
- Wholesale distribution



## 5. Market Research

### Industry Overview

- Size of the wine market (national / regional)
- Growth trends (premiumization, DTC, sustainability)
- Consumer behavior shifts

### Target Market

- Demographics (age, income, lifestyle)
- Psychographics (values, purchasing motivations)
- Occasions (gifting, dining, collecting, everyday drinking)

### Customer Segments

- Direct-to-consumer buyers
- Wine club members
- Restaurants & hospitality
- Retail wine shops
- Distributors

### Market Needs & Gaps

- What customers want but aren't getting
- Price or quality gaps
- Experience gaps (storytelling, access, education)

## 6. Competitive Analysis

### Direct Competitors

List 5–10 similar wine brands or businesses.

| Competitor | Price Range | Strengths         | Weaknesses           |
|------------|-------------|-------------------|----------------------|
| Brand A    | \$30–\$45   | Strong brand      | Limited DTC          |
| Brand B    | \$20–\$30   | Wide distribution | Inconsistent quality |



## Indirect Competitors

- Spirits, craft beer, RTDs
- Other experiential brands (restaurants, cocktail bars)

## Competitive Advantage (“Moat”)

- Differentiation (story, sourcing, quality, experience)
- Barriers to entry
- Why customers choose *you* instead

# 7. Sales & Distribution Plan

## Sales Channels

- Direct-to-consumer (website, tasting room)
- Wine club / subscriptions
- Wholesale (on- and off-premise)
- Distributors (state-by-state strategy)

## Pricing Strategy

- Cost of goods
- Margin targets
- Wholesale vs retail pricing
- Promotional strategy (limited discounts, bundles)

## Sales Forecast

- Year 1–3 case sales by channel
- Average order value
- Customer acquisition cost (CAC)

# 8. Marketing & Brand Strategy

## Brand Identity

- Brand voice & tone
- Label design philosophy
- Storytelling approach



## **Marketing Channels (examples)**

- Website & email marketing
- Social media (Instagram, TikTok, YouTube)
- Influencers / sommeliers
- Events & tastings
- PR & press placements

## **Customer Retention**

- Wine club benefits
- Loyalty programs
- Exclusive releases
- Community building

# **9. Operations Plan**

## **Production & Supply Chain**

- Grape sourcing
- Winemaking partners
- Bottling & storage
- Shipping & fulfillment

## **Regulatory & Compliance**

- Federal & state wine licenses
- Compliance partners
- Label approvals

## **Key Vendors**

- Growers
- Winemaker
- Designer
- Compliance service
- Fulfillment partner

# **10. Management & Team**

## **Founders & Leadership**



- Backgrounds & relevant experience
- Roles & responsibilities

## **Advisors**

- Winemaking
- Legal / Compliance
- Finance
- Sales & distribution

## **11. Financial Plan (from WBE calculators)**

### **Startup Costs**

- Equipment
- Inventory
- Licensing
- Branding & marketing

### **Revenue Projections**

- 3–5 year forecast
- Channel breakdown

### **Expenses**

- Cost of goods sold
- Marketing
- Payroll
- Distribution & shipping

### **Break-Even Analysis**

- Monthly fixed costs
- Required sales volume

## **12. Growth Strategy & Goals**

### **Short-Term Goals (12–24 months)**

- Production targets
- Revenue milestones
- Distribution expansion



## **Long-Term Goals (3–5 years)**

- Case growth
- Geographic expansion
- Brand extensions
- Exit or acquisition strategy (if applicable)

## **13. Risk Analysis**

- Agricultural risk
- Regulatory changes
- Market competition
- Supply chain disruptions
- Economic downturns

## **14. Appendix**

- Label designs
- Financial Reports (from Cost of Goods (COGs), Product Pricing calculators)
- Market research data
- Press coverage