

PRO Business Plan Pro® 2003

Business Plan Pro 2003

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Smallbiztechnology.com Review

Review: Palo Alto's Business Plan Pro 2003
 Jeffrey Siegel, Smallbiztechnology.com Reviewer
 President EZ Data Solutions, L.L.C.
<http://www.ezdatasolutions.com>

Ask an entrepreneur if she has a business plan and you'll often hear: "I haven't gotten around to it," "As soon as I have the time," or "I'm so busy trying to build the business." But we all know (don't we?) that a business without a business plan is like a journey without a map...you'll get somewhere but it may not be the desired destination. Palo Alto's Business Plan Pro 2003 helps you create that business roadmap. Its combination of Office-like features (word-processing, spreadsheet, charting), built-in wizards, and extensive on-line help will make it possible for you to begin with "routes" that are laid out for you. All you need to do is fill in the destination.

You begin by completing some basic information about your company (name, location, startup or on-going, etc.) and its SIC code (it does a lookup of codes if you are unsure). Based on this information it generates an "outline" of your business plan. It's up to you to fill in the details: "What are you selling?" "Who is your target market?" "What are your assets and expenditures?" and so on. If you are not sure how to answer these questions, you can use the help provided in the form of "sample" text (or figures) with explanations, cross-references to additional online help and to web-based help, and, finally, references to two books that are included with the software. Further, you can jump to the sections you are most comfortable with, such as your Mission Statement or describing the company personnel, and return, at a later time, to the sections that may make your eyes glaze over, such as the Balance Sheet.

Initially this may seem like a daunting task. However, if you have never created a business plan before, it comes with more than four hundred "canned" business plans. Find one suitable to your business and use it as a guide for your own plan. The extensive help - both online and in print format - is there to explain it all.

So you've completed your plan. Now what? You can customize the printed output for different audiences: venture capitalists; bankers, etc. And you can revisit your business plan at a later time, inputting new information (altered mission statement; new cash flow numbers; new sales targets, etc.) and see how it impacts other forecasts. Once you've become a "pro" using Business Plan Pro, you can add additional sections to the business plan, input new formulas in its spreadsheet, and so forth.

The software itself is easy to install. After installing it on a Windows 2000 machine, it checked the web for the latest update and everything went smoothly. Further, Business Plan Pro comes with a complement of export and import features. You can import data from Intuit's Quickbooks and export/import to MS Word and Excel. However, Business Plan Pro has so much functionality built into it that you would need a compelling reason to export your business plan (or sections of it) to either of these applications. For those requiring collaboration features and enhanced financial features, a "Premier" version (not reviewed here) may be the ticket.

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