



Business Plan Checklist

Business Name _____ Submittal Date _____
Submitted By _____ email: _____

- Most successful Business Plans contain the information outlined in the sections below, although not necessarily in this order. If box is checked, information was found and is adequate. If not, box is not checked and explanation given.

Section 1 Executive Summary

- Contains information about ownership, products and services, market & management _____
- Summarizes any financial request _____

Section 2 Company Summary

- Purpose and Mission _____
- Ownership and Organization _____
- Location and Facilities _____
- Operations _____

Section 3 Products and/or Services

- Description of each product or service _____
- Source or cost of products _____
- Show how products meet specific market demand _____

Section 4 Market Analysis

- Target markets described in detail, including trends, growth and numbers _____
- Demographics relative to markets _____
- Customer Estimates _____
- Competitive Analysis _____

Section 5 Market Strategy

- Descriptions of how product or service is positioned, priced, placed, promoted and sold _____
- Description of how customers are cared for _____

Section 6 Management Summary

- Names and summary of experience, education and qualifications of each key manager _____
- Organization chart or description of how each management function is accomplished _____ (marketing/sales, operations, accounting, admin, HR, legal)

Section 7 Financial

- Sources and Uses of Funds _____
- Financial and sales assumptions _____
- Past years' Profit & Loss and Balance Sheet _____
- Past 3 Years Projected Profit and Loss Statements _____
- Personal Income Statements and Balance Sheet _____

Section 8 Appendix

- Photos of Existing or Proposed Shop, Office, Plant or Store _____
- Equipment Lists, Leases, or any data supporting any section of Plan _____

Overall Plan Format, Grammar, Spelling and Punctuation
