#

Business Plan Checklist

**Reminder: Pictures say 1,000 words.**

# **COVER PAGE**

* Show the Business Name
* Show the Business Address
* Include the Company Logo/Slogan
* Show the Telephone/Fax Number
* Present the Web Address
* Include the Contact Person’s Name, Phone Number, & Email Address

# **Company Background**

### BusinessDescription

* Describe When & Why the Company Was/Will Be Formed
* Describe What the Business Does/Will Do
* CompanyHistory
* Any Notable Accomplishments of the Business

### Ownership

* Identify the Majority Owners of the Business & Their Ownership Interest

## **Business Opportunity**

### Paragraph #1

* Define the Industry
* Summarize the Industry Trends
* Summarize the Industry’s Competitive Environment

### Paragraph #2

* Provide the Customer Profile
* Identify Why the Customers Buy
* Identify the Location of the Target Market
* Identify the Size of the Local Target Market

## **Product/Service**

### Paragraph #1

* Provide a Summary Description of the Products/Services
* Summarize the Major Features of the Products/Services
* Summarize the Significant Benefits of the Products/Services to the Customers
* Address the Uniqueness of the Products/Services

### Paragraph #2

* Summarize the Business Protection [Patents, Trademarks, Copyrights, etc.]
* Summarize the Sales History of the Products/Services
* Summarize the Marketing Strategies

## **Primary Competitors**

* Identify Your Major Competitors
* Compare Your Major Competitors with Your Business [Price, Target Market, Location, Hours, Online, Features, Value Added Services, Warranties, Partners, Advertising & Promotions, Distribution, & Suppliers]
* Compare the Strengths & Weaknesses of Your 3 Major Competitors with Your Business

## **Marketing Plan**

* Describe the manner in which the business location attracts customers
* Describe the manner in which the business attracts customers online

## **Ownership**

* Identify the Ownership Team (Name, % Ownership, etc.)
* Summarize the Management’s Experience (include resume for each as appendix)

## **Financing Request**

* Specify the Amount of the Request
* Specify the Breakdown of the Proceeds [Equipment, Marketing, Working Capital, etc.]
* Specify the Type of Request [Loan, Investment, etc.]
* Address the Repayment Terms Requested [Loan]