

## BUSINESS PLAN CHECKLIST

### 1 EXECUTIVE SUMMARY

- Function of Your Business
- Competitors
- Target Audience
- Key Financial Highlights
- Key Members of Your Team
- Business Goals

### 2 COMPANY OVERVIEW

- Company History
- Founding Members
- Milestones You Have Achieved
- Legal Structure of Your Business

### 3 INDUSTRY ANALYSIS

- Market Size
- Current Market: Growing or Declining?
- Key Competitors
- External Influences on the Market

### 4 CUSTOMER ANALYSIS

- Customer Needs
- Target Customers
- Demographic Profile
- Customer Segmentations

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# COMPETITIVE ANALYSIS

- Direct Competitors
  - Features Offered
  - Pricing
  - Target Customers
  - Strengths
  - Weaknesses
- Indirect Competitors
  - Features Offered
  - Pricing
  - Target Customers
  - Strengths
  - Weaknesses
- Competitive Advantage
  - Features Offered
  - Pricing
  - Customer Service
  - Unique Value Proposition

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# MARKETING PLAN

- Product
- Price
- Place
- Promotions

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# OPERATIONS PLAN

- Daily Operations Processes
- Long-Term Goals & Milestones

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## MANAGEMENT TEAM

- Management Team Members
  - Background
  - Skills & Talents
- Management Team Gaps
- Board Members

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## FINANCIAL PLAN

- Profit & Loss Statement
- Cash Flow Statement
- Balance Sheet
- Sales Forecast
- Personnel Plan
- Break-Even Analysis

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## APPENDIX

- Resumes of Key Management Team Members
- Job Descriptions/Titles for Management Team Gaps
- Copies of Forms
- Copies of Licenses
- Personal and Business Tax Returns (if applying for a loan)
- Marketing Materials

**Need More Help?**  
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