

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?

**Visit Our [Business Plan Checklist Article](#)
For More Information.**