

BUSINESS PLAN QUESTIONNAIRE

1 EXECUTIVE SUMMARY

- What is the issue your business is addressing?
- How are you solving it?
- What are your business's strengths?
- Why should an investor be interested in your business?

2 COMPANY OVERVIEW

- What is your business' mission?
- What is your history?
- What are some of your past achievements?
- What is your business' legal structure?
- Where is your business located?
- Why did you start the business?
- How do you measure your company's success?

3 INDUSTRY ANALYSIS

- What is the size of the market?
- What are the characteristics of the market: growth trends, units sold, employment?
- What factors are influencing growth or decline in the market?
- Are there any barriers to entering the market?
- Are there any government regulations that affect the market?

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CUSTOMER ANALYSIS

- What is the size of the target customer market?
- Where are these customers located?
- What are their desires and needs, and how will your business meet those needs?
- In descriptive terms, who is your target market? (what motivates them to purchase, what influences their purchasing decisions)
- Why will your target customers seek out your business?
- What trends/purchasing shifts could occur in the market?

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COMPETITIVE ANALYSIS

Focus on your competition and what they are up to:

- Who are your direct competitors? (e.g., other businesses in your genre)
- Who are your indirect competitors? (e.g., other businesses that may not be specifically in your business's genre, but provide similar results to that of your business)
- What are your competitors' strengths and weaknesses?
- What are their products and pricing like?

Then, look into your business' competitive advantage to describe how your business will be better.

- Will you offer more or better features?
- Will you ensure better results for your users?
- Will you offer better pricing?
- Will your customer service be more efficient?

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MARKETING PLAN

- How will you communicate to your target customers about your products/services?
- Why are you choosing these specific marketing avenues?
- What marketing materials do you have or need, and what will be the cost of this?
- What do you plan to spend on marketing per prospect and per client?
- How will your company attract publicity?
- What media will you target?
- How will your products/services be delivered to the market?
- How might future changes impact your marketing?
- How will you price your product relative to others in the market to be competitive yet profitable?
- What type of payment will you accept?
- Overall, how will your marketing strategy be effective to your target customers?

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OPERATIONS PLAN

- What equipment is needed, and what is the cost?
- What are your hours of operation and number of shifts?
- How many employees will you have?
- What are the skill sets required when looking to hire new employees?
- What are your practices for scheduling, managing and hiring personnel?
- What are the processes you will use to produce and sell your product/service?
- What is your purchasing process?
- How will finished goods be distributed?
- How will quality be measured and improved overtime?
- What will your procedures to keep track of inventory look like?

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MANAGEMENT TEAM

- Who are your founding members and what is their background?
- Who are your team members and what are their responsibilities?
(include position title, persons name and role)
- Do you offer any ownership options to attract key management?
- Do you have any Board of Directors?
- Do you have any outside consultants that will work with your company as it grows?
- What is your business' organization structure?

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FINANCIAL PLAN

- How were your numbers calculated?
- Why are the salaries and office expenses you have calculated reasonable to your business?
- Why are your expense estimates realistic?
- How have you budgeted for unexpected costs?
- Is there any debt the business currently has?
- What is the amount of equity the owners and stockholders have?
- What is your annual interest expense?
- What is the percentage of sales issued for returns?
- What is your average daily inventory value?
- Are you using a fixed or variable inventory method?
- What is the limit on your line of credit and the average interest rate?
- What is your minimum checking account balance to have at all times?

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APPENDIX

- Resumes of key management
- Blurbs on other management members
- Job descriptions/titles
- Copies of any agreements having bearing on the business plan
- Copies of licenses
- Personal and business tax returns (if applying for a loan)
- Marketing materials
- Photos or sketches of the building, property, equipment, products
- Industry studies or information supporting industry trends
- Summaries of secondary market studies

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