

Student Name: _____

Business Name/Type: _____

Period: _____

Business Plan Check List

Title Page

Name of Business w/ logo, Name of the High School, _____ ✓ 5 pts
Student Name, Email Address, Date

Binding (Business Name, Student Name) _____ ✓ 5 pts

Table of Contents _____ ✓ 10 pts

Body of the Business Plan

I. Executive Summary (single spaced, \$\$\$ request) _____ ✓ 10 pts

II. Introduction (w/ pulled mission statement, goal & objectives) _____ ✓ 10 pts

III. Analysis of the Business Situation

A.. Trading area analysis _____ ✓ 10 pts

1... Geographic and demographic information (city info) _____ ✓

2... Market segment analysis of target market (market info) _____ ✓

3... Customer buying behavior (customer info/survey research) _____ ✓

4... Analysis of the potential location (property info) _____ ✓

B.. Competitors _____ ✓ 10 pts

1... Primary competitor's strengths and weaknesses _____ ✓

2... Competitive advantages and disadvantages _____ ✓

IV. Planned Operation of the Proposed Business _____ ✓ 10 pts

A.. Proposed organization (business type, staffing, job descriptions, org chart) _____ ✓

B.. Proposed business (business detail, startup costs) _____ ✓

C.. Proposed strategies (pricing, markups, marketing plan w/ example) _____ ✓

V. Planned Financing _____ ✓ 10 pts

A.. Projected Income and Expenses

1... Financial narrative (explain inc. & exp in detail) _____ ✓

2... Financial statements (IS, CF, BS) _____ ✓

B.. Proposed plan to meet capital needs _____ ✓

1... Personal, internal, external sources (explain funding detail, \$\$\$ request) _____ ✓

2... Earnings, short term and long term (explain 1, 2, 3 year) _____ ✓

3... Plan to repay borrowers (amount, rate, term) _____ ✓

VI. Bibliography/websites _____ ✓ 10 pts

Formatting (margins match, indents make sense, info is grouped) _____ ✓ 10 pts

Appendix

Important Articles _____ ✓

Market Research _____ ✓

Sample Sales Letter _____ ✓

Sample Claim/Complaint Letter _____ ✓

Sample Memo _____ ✓

Sample Pitch _____ ✓

Business Equations (ROA, ROI, PM, BE, other) _____ ✓

Other Marketing Materials _____ ✓