

Student Name: _____

Business : _____

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, Period) _____ ✓ 5 pts

Table of Contents _____ ✓ 5 pts

Body of the Business Plan

I. Executive Summary (one page, 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, org chart) _____ ✓

B.. Proposed business (business detail) _____ ✓

C.. Proposed strategies (Include a marketing plan) _____ ✓

V. Planned Financing _____ ✓ 10 pts

A.. Projected Income and Expenses

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

2... Financial statements (Start-up Costs, CF, IS, BS) _____ ✓

B.. Proposed plan to meet capital needs _____ ✓

1... Personal and internal/external sources (explain funding detail) _____ ✓

2... Earnings, short term and long term (explain 1, 3, 5 year inc.) _____ ✓

3... Plan to repay borrowers (explain debt service) _____ ✓

VI. Conclusion (restate \$\$\$ request) _____ ✓ 10 pts

VII. Bibliography _____ ✓ 10 pts

Appendix

1st Year Sales _____ ✓

Fixed and Variable Costs _____ ✓

Sample Sales Letter _____ ✓

Sample Claim/Complaint Letter _____ ✓

Sample Memo _____ ✓

Sample Telephone Script _____ ✓

Business Equations (updated CH12 Equations, BE, ROA, ROI) _____ ✓

Other Marketing Materials _____ ✓