

BUSINESS PLAN ELEMENTS CHECKLIST

1. Introduction

- Title Page
- Executive Summary
- Table of Contents
- Confidentiality and Copyright

2. Business Concept

- The Business
- Products and Services
- The Industry
- The Owner(s)
- Strategic Plan and Goals

3. Marketing

- Market Area
- Location: Marketing
- Profile of the Customers
- Competition and Differentiation
- Sales and Distribution
- Servicing and Guarantees
- Image
- Advertising and Promotion
- Pricing Strategy
- Marketing Action Plan

4. Operations

- Description of the Operation
- Equipment and Methods
- Materials and Supplies
- Risk and Mitigation
- Management
- Professional Services
- Employees and Contractors
- Operational Action Plan

5. Financial

- Sales Forecast
- Explanation of Projections
- Market Share
- Cost of Goods Sold
- Labour Projections
- Cash Flow Forecast
- Operating Expenses
- Projected Income Statement
- Break-even Analysis
- Pro Forma Balance Sheet
- Start-up Expenses
- Uses and Sources of Funds

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- Historical Financial Statements
- Organizational Charts
- Board or Band Council Resolution
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- Glossary of Terms