Taking the Plunge

CHECKLIST: Business Plan Checklist

Use this checklist to keep track of progress when compiling your business plan.

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|  | By Whom and When |
| 1. Executive Summary |  |
|  Overview of Business Plan |  |
|  Key Points |  |
| 2. Introduction |  |
|  Business background/idea |  |
|  Business details |  |
|  Legal status |  |
|  Owner/management team details |  |
|  Product/service details |  |
|  Plan for the future and success criteria |  |
| 3. Market and Competitors |  |
|  Market overview, size and trends |  |
|  PEST (LE) analysis |  |
|  SWOT analysis |  |
|  Customers/target markets |  |
|  Competitor analysis |  |
| 4. Sales and Marketing Strategy |  |
|  Marketing objectives |  |
|  Marketing strategies |  |
|  Target market |  |
|  Pricing strategy |  |
|  Sales forecast |  |
|  Budget and timeline |  |
| 5. Operations |  |
|  Location/premises/equipment |  |
|  Production and distribution processes |  |
|  People/staff/suppliers |  |
|  Systems and procedures |  |
|  Health & Safety/quality control/legal compliance |  |
| 6. Financial Information |  |
|  Cashflow forecast |  |
|  Sales forecast |  |
|  Set-up and operational costs |  |
|  Sources of finance/funding requirements |  |
|  Profit & Loss statement |  |
|  Balance sheet |  |
| 7. Appendices |  |
|  Evidence of market research |  |
|  Letters from potential customers/firm orders |  |
|  References/Previous work |  |
|  Legal documents |  |
|  Price lists |  |
|  CVs for key team members |  |
|  Sample promotional material |  |

Starting and Growing a Profitable Business – Starting Up