

Business Plan Checklist

Please note that the elements of your business plan might vary depending on the nature of your business and in some cases, your lender's requirements. For a list of resources to help you develop each of the areas outline below, please refer to our [Business Plan Resources Guide](#).

✓	SECTION	HAVE YOU INCLUDED?
<input type="checkbox"/>	1. Executive Summary	<ul style="list-style-type: none"> • Max one page summary of key points covered in your plan <i>(including high level description of your company and products/service, proposed sources and use of funds, competitive advantage)</i>
<input type="checkbox"/>	2. Description of Company	<ul style="list-style-type: none"> • Nature of business • Brief history of business <i>(including when and by whom it was started, company structure)</i> • Company Size and Location <i>(relative to their market)</i>
<input type="checkbox"/>	3. Description of Product/Service	<ul style="list-style-type: none"> • Key features and benefits • Pricing
<input type="checkbox"/>	4. Market Analysis	<ul style="list-style-type: none"> • Industry Analysis <i>(including trends, opportunities and threats, competitive analysis, main competitors, etc.)</i> • Market Research <i>(proof that there is demand for your product/service)</i> • Target Market <i>(who are your typical customers, how do they behave, what are their characteristics)</i> • Market Niche
<input type="checkbox"/>	5. Marketing Plan	<ul style="list-style-type: none"> • Pricing • Product Positioning • Promotion/Advertising • Sales and Distribution
<input type="checkbox"/>	6. Operations	<ul style="list-style-type: none"> • Production or Procurement <i>(describe the processes required to run the business)</i> • Inventory Management • Personnel • Others <i>(e.g. hours of operation, licenses and permits required, one-year action plan, etc.)</i>
<input type="checkbox"/>	7. Financial Plan	<ul style="list-style-type: none"> • Historic Financial Statements <i>(if it is an existing business)</i> • Financial Projections <i>(cash flow projections for a minimum of 12 months based on unit sales forecast, if possible include sensitivity analysis)</i> • Financing Requirements & Capital Purchases <i>(including funds required, use of funds, proposed repayment terms)</i> • Breakeven Analysis • Accounts Payable and Receivable
<input type="checkbox"/>	8. Risk Analysis and Contingency Plan	<ul style="list-style-type: none"> • Competitive Reaction • External Risks • Internal Risks • Risk Management & Contingency Plans
<input type="checkbox"/>	9. Supporting Materials	<ul style="list-style-type: none"> • You can include photographs of the product or space, resume of the key members of the management team, letters of intent, letters of support, etc.