

## BUSINESS PLAN CONTENTS CHECK LIST

Mark the items on the listing below that you want to include in your business plan and add any other items that don't appear on the list. (If your contents are significantly different from below, it might be easier for you to create your own contents listing from "scratch.")

### 1. Introductory Elements

- ☐ Cover & Title Page
- ☐ Table of Contents
- ☐ Statement of Purpose of the Business Plan
- ☐ Company Strategic Objective & Strategic Purpose (may also include Core Organizational Values & Beliefs)
- ☐ Company Story

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### 2. Overall Company Development/Growth Plan

- ☐ Goals, including Key Strategic Indicators & major business indicators
- ☐ Assumptions
- ☐ Schedule
- ☐ Budget & Sources of funds

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### 3. Overall Corporate Plan

- ☐ Systems Development Plan
- ☐ Organizational Strategy
- ☐ Organizational, Leadership, Management, & Personnel Goals
- ☐ Management Strategy & Personnel (Staffing) Strategy
- ☐ Description of Key Management Systems
- ☐ Quantification Plan, Reporting Vehicles (how you'll measure & evaluate performance)

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### 4. Marketing Plan

- ☐ Marketing Goals
- ☐ Overall Description of General Market, Company Image & Positioning, External Market Forces (competition, laws & regulations, societal forces)
- ☐ Descriptions specific to different market segments:
- ☐ Target Market Description (demographics, trading area, & psychographics)
- ☐ Positioning, Sensory Package, External Forces, Marketing Strategy
- ☐ Quantification Plan, Reporting Vehicles

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### 5. Financial Plan

- ☐ Financial Goals
- ☐ Table of Contents
- ☐ Overall Financial Strategy, Pricing Strategy
- ☐ Description of Key Financial Systems & Reports
- ☐ History of Recent Financial Performance
- ☐ Pro-forma Financial Statements
- ☐ Financial Summary

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## 6. Client Fulfillment Plan

- ☐ Client Fulfillment Goals
- ☐ Products/Services Descriptions
- ☐ Production Strategy
- ☐ Service Strategy
- ☐ Delivery Strategy
- ☐ Customer Service Strategy
- ☐ Quantification Plan, Reporting Vehicles

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## 7. Lead Conversion Plan

- ☐ Lead Conversion Goals
- ☐ Description of Lead Conversion/Sales Personnel
- ☐ Description of Lead Conversion/Sales Process & Key Systems
- ☐ Quantification Plan, Reporting Vehicles

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## 8. Lead Generation

- ☐ Lead Generation Goals
- ☐ Description of Lead Generation Channels
- ☐ Description of Lead Generation Messages
- ☐ Description of Lead Generation Process & Key Systems
- ☐ Quantification Plan, Reporting Vehicles

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## 9. Other Unique Strategies & Factors

(not previously discussed)

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