



and key skills)

nce Agent)

o whom?)

pplicable)

of the people involved with your business?
 at help and support do you need?)

When & How

ucts/services)?

& conducted? (and why – features of the location)

ate?

nal/special events)

roduce, distribute?

try, processing, back-up?

okkeeping, other files.)

opyrights and other intellectual property?

mental and Safety

company, employee, customer, supplier

oss, Growth, Other ...

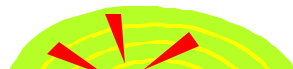
in insurance broker about the costs and types of insurance you need?

regulations and taxes apply to your business?

ve you determined apply to your business?

out your business cycles?

ventory, Financials)



4. Legal, Political, Environmental ... Issues

5. Economic Impacts

(interest rates, consumer spending, business investment/produ

6. Types & Size/s of Businesses

7. Company "Fit" in the Industry

8. Key Associations, Publications, Events, Contacts, and Other Re

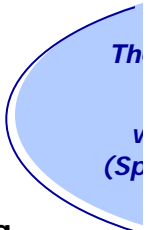
B. Target Market & Trade Area

1. Trade Area (States, Countries, Regions ...)

2. Target Market/s (Demographics, Psychographics)

a. Business-to-Business Sales

b. Consumer Market (End User)



C. Product/Service (solution), Packaging & Pricing

1. Describe Product/s & Benefits, Product Mix – Depth & Width

2. Describe Packaging

How does the packaging make it easier to display, mail, prote

3. Pricing & Payments

a. How will you price your products and/or services? Will thes
 profit? Are your prices competitive?

b. Will you accept credit cards? Will you offer your customers
 How will you handle slow-paying customers?

**D. Distribution (Place) – Making your product or service avai
 customer – Location**

E. Customer Relations – How you welcome, thank, educate – Pc

F. Competitive Advantage

1. Who Are Your Competitors? *How do they compete? What are*

2. What is your competitive advantage?

3. What are your key resources, capabilities and contacts?

G. Sales Strategies & Results

As a result of marketing and sales efforts, what is your level of s

H. Marketing Strategies (Marketing Mix, Positioning, Strategic /

How do you attract, create interaction with & call customers to a

1. Who? Right Audience – customer profile/target market

2. What? Right Message - Elements: offer, benefit, proof, call to

3. When? Right Time, Frequency (4-9x), Consistency

4. Where? Right Place Media Choices

is
 need for data-based decisions?
 ts per year, # of projects per year, average \$ per client, return on
 ees per \$, inventory turns, product rejection rate, quality, capacity, cost

When?

ge of your business?

	Weaknesses
	WO Strategies
	WT Strategies

o (vision; short & long range strategic objectives/priorities)

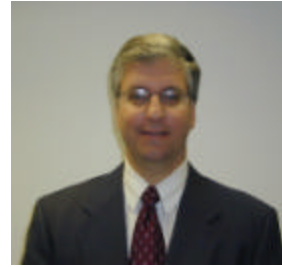
s)

o get there? (manageable tasks & action plans)

	When-Timeline	Resources Needed	Measures

o you get there? (measurable indicators)

Benefits of Business Planning



1. Organize Your Thoughts Through W
 2. Make Informed Decisions – Use You
 3. Gain Clarity, Financial Viability & Bus
 4. Target Your Destination & Set Your
 5. Set & Track Measurable Goals
- This is a business tool, featuring a fe
 the New Approach Business Planning***

I. Executive Summary

A. Company Overview

1. Mission & Vision (Mission – Why you exist / Vision
2. Company Name
3. Type (service, retail, manufacturing, construction)
4. Location
5. Legal Structure & When Formed
6. History
7. Size (sales, # of employees, sq. ft.)
8. Important Features

B. Nature of the Business

1. What product/service you sell
2. For what need/problem/marketing opportunity
3. For what market area and target market
4. What are the alternatives to your product/service?

C. Key Characteristics of the Industry

Brief Summary of the Size of the Industry, Types of I
 Issues and Your Business “Fit” in the Industry.

D. Brief Financial Highlights

Sales Forecast, Breakeven Point, Financing if needed
 (5 C's of Credit- Character, Capacity to Repay, Capital
 borrower, Conditions of the industry & economy, Coll:

E. Short Range & Long Range Strategic Objectives

F. Compelling, Market-Driven Reason Why This Bu