

Compliments of DSD Insurance. This is to be used as guide only.

## BUSINESS PLAN CHECKLIST

1. COMPANY SUMMARY	
<input type="checkbox"/>	Organizational structure of the business.
<input type="checkbox"/>	Key members of the company including background and experience.
<input type="checkbox"/>	When the company was founded and who is/are the owner(s).
<input type="checkbox"/>	What state holds the INC registry?
<input type="checkbox"/>	What brand(s) will be available? (National, regional, etc.)

  

2. OPERATIONAL STRATEGY	
<input type="checkbox"/>	<b>Information on the territory or territories the business plan is for.</b> <ul style="list-style-type: none"><li>• Currently profitable / cash flow positive?</li><li>• Initial opportunity for growth?</li><li>• Include long-term plans (future territory purchases).</li><li>• Plans to work with the local Flowers sales and management teams on marketing events, etc.</li></ul>
<input type="checkbox"/>	<b>Key customers, specific opportunities and strategies for growth. (Additional territory purchases?)</b> <ul style="list-style-type: none"><li>• Strategies may include using industry best practices, excellent customer service, quality products, quality employees and well-maintained equipment.</li><li>• Number of current stops currently in territory and number of prospective stops, the kind of business and how they will be reached.</li></ul>
<input type="checkbox"/>	<b>Identify knowledge of territory being purchased and service required for success. (Large retail outlets or restaurants?)</b>
<input type="checkbox"/>	<b>Staffing (multiple territories / sick days / vacations) plan.</b> <ul style="list-style-type: none"><li>• Who will manage the business and staffing?</li><li>• How many employees (part- or full- time) will be hired?</li></ul>
<input type="checkbox"/>	<b>Mission Statement for the company</b>

  

3. FINANCIAL PLAN	
<input type="checkbox"/>	<b>Include projected profit and loss and the assumptions made for these projections.</b> <ul style="list-style-type: none"><li>• Purchase Price</li><li>• Projected Increased Value</li></ul>
<input type="checkbox"/>	<b>Sales forecast, break-even analysis, and a statement of return on investment (ROI).</b> <ul style="list-style-type: none"><li>• When is profitability anticipated to be reached?</li><li>• By what percentage do you anticipate increasing the number of customers serviced, and how will you accomplish this?</li><li>• Give monthly goals showing increased profitability as new team members are trained and relationships with customers are made.</li></ul>
<input type="checkbox"/>	<b>Investment needed to launch the business should be stated with operating capital projections and include how the business will be financed.</b>