

# Business Plan Checklist

Everything lenders and investors expect to see in your business plan.

A strong business plan is clear, honest and backed by evidence. Use this list to check each section before you send your plan to a bank, funder or investor.

## 1 Executive summary

- ☐ Business name, location and legal structure
- ☐ What you sell and who buys it
- ☐ Why customers will choose you
- ☐ How much funding you need and how you will use it
- ☐ Key financial highlights (sales, profit, break-even)

## 2 Business & market

- ☐ Mission, vision and goals
- ☐ Products and services, with prices
- ☐ Market research with real evidence
- ☐ Target customer profile
- ☐ Competitor analysis and your advantage
- ☐ Industry trends and risks

## 3 Marketing & sales

- ☐ Positioning and key messages
- ☐ Marketing channels and budget
- ☐ Sales process and targets
- ☐ Customer service and retention plan

## 4 Operations & team

- ☐ Location, equipment and suppliers

- ☐ Key processes and timeline
- ☐ Management team and experience
- ☐ Staffing plan
- ☐ Licences, insurance and legal requirements

## 5 Financials

- ☐ Start-up costs
- ☐ Sales forecast with clear assumptions
- ☐ 3–5 year profit and loss forecast
- ☐ Monthly cash-flow forecast for year one
- ☐ Break-even analysis
- ☐ Funding request and repayment plan
- ☐ Risk analysis and contingency plan

### My notes

### Want expert help with this?

- Business Plan: a professional, lender-ready plan written with you
- Business Plan Review: expert feedback before you submit
- Financial Projections & Modelling



**Book your FREE 30-minute consultation at [www.myibusol.com](http://www.myibusol.com)**

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