

## (2) CORPORATE & BUSINESS PLAN

| <b>Scoring scale</b><br>0 = no evidence<br>1 = little evidence or major flaws<br>2 = adequate minimum standards<br>3 = Research well done, few minor omissions, met standards<br>4 = Research well done, exceeded minimum standards  | (a)<br>Weighta<br>ge (%) | (b)<br>Score<br>(0-4) | (a)x(b)/<br>4<br>Total | Comments |
|--|--------------------------|-----------------------|------------------------|----------|
| <b>1. Cover Page</b><br>All information present, including:<br>-Name of the Business<br>-Company logo<br>-Any other information that you feel is pertinent   | 2                        |                       |                        |          |
| <b>2. Table of Contents</b><br>Includes each major section.<br>Includes page numbers.<br>Organized and neat.   | 2                        |                       |                        |          |
| <b>3. Executive Summary</b><br>Each key section briefly summarized.<br>Specifically answer the followings:<br>-What business are you in?<br>-Where will you locate and why?<br>-What is your product/service?<br>-How much capital will be needed?<br>-Why should someone invest in your company   | 4                        |                       |                        |          |
| <b>4. Business Description</b><br>Basic information (mailing address, phone number, website, email, etc.)<br>Legal form (partnership, corporation, etc.) – be specific<br>Mission statement<br>Goals & objectives<br>Nature of business, its primary product/service, its current status (start-up/buyout)   | 5                        |                       |                        |          |
| <b>5. Product or Service Description</b><br>Give sufficient detail to enable investors to develop a working understanding of what the company sells<br>May include photographs, schematic drawings, and descriptive scenarios<br>Describe how product/service fills a gap in the market or how your product/service is “better, cheaper, and/or faster” than what is currently available<br>Focus on the benefits of each feature<br>Feature refers to what the product/service is<br>Benefits refer to what the product/service does<br>Growth Strategy   | 10                       |                       |                        |          |
| <b>6. Industry, Target Customer, &amp; Competitor Analysis</b><br>Describe the broader industry in which you will be competing<br>Identify the different segments of the industry<br>Describe in detail the niche in which you plan to participate<br>Specifically identify the target market<br>Review of firm’s top competitors & their relative market share<br>Examine markets that competitors serve & the strategies they employ<br>Describe barriers to entry and articulate strategies for overcoming them<br>Barriers to entry (characteristics of an industry that make it difficult to start new ventures)<br>Describe expected response from competitors | 10                       |                       |                        |          |
| <b>7. Market Analysis</b><br>Describe how the firm will reach and service customers within a given market<br>Explain the marketing strategy<br>How will customers be identified and attracted?<br>Pricing strategies<br>Selling approach & Type of sales force<br>Describe advertising and promotion campaign<br>Media used—viewer/listener profiles<br>Media costs, Frequency of usage<br>Plans for generating publicity<br>Web presence<br>Credit and pricing policies<br>Budget for marketing plan (Hint: Leverage as much free advertising as possible)  | 10                       |                       |                        |          |

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| <b>8. Location &amp; Layout</b><br>Location<br>Demographic analysis of location versus target customer profile<br>Traffic, Lease/Rental rates<br>Labor needs & supply, Wage rates<br>Layout, Size requirements & Layout plan (suitable for an appendix)  | 5                    |                       |                        |  |
| <b>9. Management Team</b><br>Emphasize relevant expertise that each team member experience education<br>Duties<br>List & highlight strengths of other stakeholders who will contribute management or consulting expertise<br>Board of Directors, Advisory Board<br>List legal counsel or other professional service firms such as accounting, management, etc.   | 5                    |                       |                        |  |
| <b>10. Financial Projections</b> - Accurate, correct format, consistent, realistic<br>Should be conservative but achievable; reasonable yet compelling<br>Sales forecast<br>Lists product(s)/service(s) to be sold<br>Price at which product(s)/service(s) will be sold<br>Number of units of each product/service that will be sold each month<br>Pro-Forma Financial Statements<br>Income Statement (Profit & Loss Statement)<br>Cash Flow Statement, Balance Sheet, Breakeven Analysis, Ratios  | 20                   |                       |                        |  |
| <b>11. Loan or Investment Proposal</b><br>Amount requested<br>Purpose and uses of funds<br>Repayment or “cash out” schedule (exit strategy)<br>Timetable for implementing plan and launching business  | 5                    |                       |                        |  |
| <b>12. Appendices</b><br>The Appendices (beginning on a separate sheet at the end of your plan) can include pertinent information about yourself and your business that is not included elsewhere in the plan. DO NOT REPEAT INFORMATION FROM PREVIOUS SECTIONS. The appendices should be used to complement or supplement your previous information. Some possible details to include are:<br>1. Organizational structure (if not previously listed), including management structure, organization chart(s), and resumes of key people<br>2. Major assumptions you have made in preparing the plan<br>3. Brochures or other published information describing the product(s) and service(s) you provide<br>4. Layout schematic<br>5. Details of objectives and goals<br>6. Catalogue sheets, photographs, or technical information<br>7. Web page design<br>8. Anything else that is pertinent | 5                    |                       |                        |  |
| <b>13. Writing Style &amp; Grammar</b><br>Structured and coherent<br>Spelling, capitalization, punctuation, grammar, word choice, and sentence structure<br>No glaring grammar mistakes and proper use of punctuations   | 7                    |                       |                        |  |
| <b>14. Adherence to the Norm</b><br>Similarity index is maximum 20%<br>On time submission – examiner’s copy and office copies are submitted on due time  | 10                   |                       |                        |  |
| <b>Total</b>   | 100                  |                       |                        |  |