EXECUTIVE SUMMARY

Does the summary articulate an opportunity and a consistent plan for Marketing; Finance; Operations; and the necessary Management Team.

1 2 3 4 5 6 7 8 9 10
Comments:

OPPORTUNITY

Is the opportunity clearly defined? What is the economic opportunity? What is the proposed business model?

1 2 3 4 5 6 7 8 9 10
Comments:

MARKET POTENTIAL / DISTRIBUTION / STRATEGY

What are the market characteristics? Is there a strategy in place to reach this market? How big is the market and what is the market share? (Keep in mind pricing, who is going to sell the product, market trends, etc.)

1 2 3 4 5 6 7 8 9 10
Comments:

PRODUCTS AND/OR SERVICES

Are the products and services clearly defined? What stage is the product in? What is the advantage of this product/service over those that already exist in the marketplace? What are the disadvantages?

1 2 3 4 5 6 7 8 9 10
Comments:

Please turn over the form to complete scoring
**COMPETITIVE ADVANTAGE**
Who else is in the industry (competitors)? What are their strengths? What are their weaknesses? What are your strengths? What are your weaknesses? What is your sustainable competitive advantage?

1 2 3 4 5 6 7 8 9 10

Comments:

**OPERATIONS STRATEGY**
What is involved in running the business? (Location, equipment needs, labor needs, overhead, inventory, etc.) How will this work and how will it help you succeed? What are the advantages? What are the disadvantages?

1 2 3 4 5 6 7 8 9 10

Comments:

**MANAGEMENT TEAM**
Who are the key members of the management team? What are their respective roles and experiences that provide them with the appropriate skills? Will this management team enlist the support of outsiders to help mentor and guide them (if necessary)? What are the qualifications of the mentors?

1 2 3 4 5 6 7 8 9 10

Comments:

**FINANCIAL FORECAST**
Are the financials consistent with the strategy of the plan? Are the financials realistic? Are suggested avenues of funding defined? Are the funding levels realistic? Is there an exit strategy?

1. First 12 months projected income statements and cash flows
2. Next 2 years of projected income statements and cash flows by quarter
3. 3 years of projected balance sheets
4. Cash flow break-even analysis

1 2 3 4 5 6 7 8 9 10

Comments:

Please turn over the form to complete scoring
OVERALL
Is the plan clearly presented? Are all costs recognized and clearly defined? Is the implementation schedule realistic?

1  2  3  4  5  6  7  8  9  10

Written Plan Total Score:_________