Business Plan Questionnaire

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CLIENT INFORMATION

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Address:

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INSTRUCTION FOR BUSINESS PLAN QUESTIONNAIRE
A good business plan should be able to convey to your potential investors that not only just the details of your business, but also why your business will be successful and profitable. When you are answering the questions contained in this questionnaire, be sure to include anything you deem relevant regarding your business. Our professionals will need all relevant information in order to draft a successful business plan for you.

SECTION 1 – GENERAL INFORMATION

Business Name:

Business Address:

How Many Locations Do You Have?

Nature of Business & Target Market: *(Describe the business you are in and who you see as your primary clientele.)*

Mission Statement: (*A short statement explaining your reason for being in the business and the guiding principles for your business.)*

✔ Organizational Information

Business Entity Structure: *(Describe how your business is legally structured. Is it an LLC? A corporation?)*

States Where Filed:

Describe Management Structure: *(How is your business managed? Do you have departments, separate teams, or unique groups that perform different tasks?)*

Requirement for Key Employees: *(What kind of qualifications & abilities that you require from the key personnel in your business?)*

Company History: *(Years in business, previous owners, failures and successes, reputation in the community, and any other relevant information regarding the history of the company.)*

✔ Personnel Information

It is common knowledge that one of the strongest factors for business success is the people who run it. Having a competent owner/management team tells the bankers/investors that you are more likely to succeed than others. Therefore, it is very important that you really spend some time in this section and list out all the relevant information that would help establish that you and your team of managers have the necessary abilities & track records for success. (Add additional pages if necessary.)

Owners

■ Owner 1 Name: Owner Percentage:

Form of Ownership: *(Shares, Partner, Units?)*

Extent of Involvement: *(Full Control, Passive Investor?)*

Relevant Experience in Business:

Other Qualifications: *(Education, Licenses, Etc.)*

■ Owner 2 Name: Owner Percentage:

Form of Ownership: *(Shares, Partner, Units?)*

Extent of Involvement: *(Full Control, Passive Investor?)*

Relevant Experience in Business:

Other Qualifications: *(Education, Licenses, Etc.)*

■ Owner 3 Name: Owner Percentage:

Form of Ownership: *(Shares, Partner, Units?)*

Extent of Involvement: *(Full Control, Passive Investor?)*

Relevant Experience in Business:

Other Qualifications: *(Education, Licenses, Etc.)*

■ Owner 4 Name: Owner Percentage:

Form of Ownership: *(Shares, Partner, Units?)*

Extent of Involvement: *(Full Control, Passive Investor?)*

Relevant Experience in Business:

Other Qualifications: *(Education, Licenses, Etc.)*

■ Owner 5 Name: Owner Percentage:

Form of Ownership: *(Shares, Partner, Units?)*

Extent of Involvement: *(Full Control, Passive Investor?)*

Relevant Experience in Business:

Other Qualifications: *(Education, Licenses, Etc.)*

Officers & Managers

■ Officer Name: Position:

Educational Background & Relevant Experience:

Responsibilities & Authority:

Compensation:

Special Acknowledgements & Awards:

■ Officer Name: Position:

Educational Background & Relevant Experience:

Responsibilities & Authority:

Compensation:

Special Acknowledgements & Awards:

■ Officer Name: Position:

Educational Background & Relevant Experience:

Responsibilities & Authority:

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■ Officer Name: Position:

Educational Background & Relevant Experience:

Responsibilities & Authority:

Compensation:

Special Acknowledgements & Awards:

■ Officer Name: Position:

Educational Background & Relevant Experience:

Responsibilities & Authority:

Compensation:

Special Acknowledgements & Awards:

Board of Directors or Advisors

Having a Board of Directors or Advisors provides your business with invaluable expertise about your industry and the operation of your business. A list of well-known or influential people on your advisory board can indefinitely boost your business's credibility.

■ Board Member Name:

Educational Background & Relevant Experience:

Extent of Involvement:

■ Board Member Name:

Educational Background & Relevant Experience:

Extent of Involvement:

■ Board Member Name:

Educational Background & Relevant Experience:

Extent of Involvement:

■ Board Member Name:

Educational Background & Relevant Experience:

Extent of Involvement:

■ Board Member Name:

Educational Background & Relevant Experience:

Extent of Involvement:

■ Board Member Name:

Educational Background & Relevant Experience:

Extent of Involvement:

Other Key Personnel *(Attorney, Accountant, Banker, Advisors. etc.)*

■ Name: Position:

Why are they Key?:

■ Name: Position:

Why are they Key?:

■ Name: Position:

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■ Name: Position:

Why are they Key?:

SECTION 2 – SERVICE & PRODUCT INFORMATION

The service or product provided is the essence of your business. In this section, you should focus on demonstrating the value of your service or product. Investors and lenders want to see that they are funding something promising that will generate profits. In other words, establishing the value in your service or product would directly increase the value of your business making it more likely to receive funding.

What is the Main Industry the Business is a Part of? *(Accounting, Manufacturing, Financial?)*

List the Major Product(s) or Service(s):

For Each Major Product or Service, Please Answer the Following:

■ Product or Service 1:

Describe in Detail:

What are the main Benefits to this Product or Service for the Customer?

Is there a Major Supplier Used for this Product or Service?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

■ Product or Service 2:

Describe in Detail:

What are the main Benefits to this Product or Service for the Customer?

Is there a Major Supplier Used for this Product or Service?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

■ Product or Service 3:

Describe in Detail:

What are the main Benefits to this Product or Service for the Customer?

Is there a Major Supplier Used for this Product or Service?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

■ Product or Service 4:

Describe in Detail:

What are the main Benefits to this Product or Service for the Customer?

Is there a Major Supplier Used for this Product or Service?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

■ Product or Service 5:

Describe in Detail:

What are the main Benefits to this Product or Service for the Customer?

Is there a Major Supplier Used for this Product or Service?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

What Products or Services are Being Developed?

■ Future Product or Service:

Describe in Detail:

When Will this Product or Service be Available?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

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Describe in Detail:

When Will this Product or Service be Available?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

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Describe in Detail:

When Will this Product or Service be Available?

What is the Price Point for this Product or Service?

Are there Copyrights, Trademarks, Patents Associated with this Product?

SECTION 3 – MARKET ANALYSIS & STRATEGIES

In this part of the questionnaire, we focus on the industry and market of your business, and how you plan on gaining a market share. Basically, we are describing how big the pie is and how you are going to get a piece of it. A good market analysis should not only demonstrate the size of the industry and potential profit that can be earned, but also show your thorough knowledge of your industry.

We will research your industry information based on the product and services described above. We will use this information, as well as the information provided below, to create a market analysis.

Describe Your Current Marketing Efforts:

What Efforts Have Been Most Successful?

What Efforts Have Been Discontinued for Lack of Success?

What Type of Marketing Would You Like to Engage in Going Forward?

✔ Target Market

What is Your Primary Target Market?

Primary Location of this Market:

What Characteristics Defines Your Target Market?

Why Would This Demographic Choose Your Product or Service Over Your Competitors?

Who are Your Main Competitors?

What Makes their Marketing Successful?

What Makes their Marketing Fail?

What is Your Share of the Total Market for Your Target Market?

✔ Future Changes in Market

Are there Laws, Regulations or Restrictions that Materially Impact Your Marketing Efforts?

Are there any Changes Proposed or Imminent to these Laws, Regulations or Restrictions?

How will These Changes Help or Hinder Your Marketing Efforts?

✔ Sales Force

Do You Have a Dedicated Sales Team or Sales Program Internally? *(Describe)*

Do You Use Outside Salespeople? *(Describe)*

Do You Foresee Changes in Your Sales Force Strategy?

SECTION 4 – FINANCIAL & FUNDING INFORMATION

This section provides concrete evidence of how your business has performed. The information in this section also provides details of your business assets and liabilities. The projections show the business's potential and the likely future. You will need to provide us with all the financial data listed below. They will then be professionally reviewed and incorporated into your business plan.

Provide Past Three (3) Years of Filed Business Tax Returns:	☐ Included	☐ Need to File	☐ N/A
Provide 12 Months of P&L Statements:	☐ Included	☐ Need to File	☐ N/A
Provide Year End Balance Sheet for Past Year Ends:	☐ Included	☐ Need to File	☐ N/A
Provide Current Balance Sheets:	☐ Included	☐ Need to File	☐ N/A
Articles of Incorporation or Formation Documents:	☐ Included	☐ Need to File	☐ N/A
Provide Current Balance Sheets:	☐ Included	☐ Need to File	☐ N/A
All Business Licenses:	☐ Included	☐ Need to File	☐ N/A
Brochures, Marketing and Other Materials:	☐ Included	☐ Need to File	☐ N/A
Copies of Leases and Major Contracts (in Excess of $10,000):	☐ Included	☐ Need to File	☐ N/A

✔ Funding Request

In this section, you will lay out how much funding, if any, you need. If you need funding, you will lay out how you plan on paying the investors back. In assessing the amount you request, you must consider all aspects of your business. It is always better to request a little too much than to come back and ask for more.

How much funding is needed?

Projected Use of Funds:

If Funding is Not Requested, What is the Purpose of the Business Plan?

Proposed Collateral:

FAX THE COMPLETED QUESTIONNAIRE TO 253-238-0003.