

Business Planning *Checklist*

Current Situation

	✓
Review current product/service offering; market / competitors; marketing & sales methods; customer base; way of working (operations); financial situation	
Identify strengths, weaknesses, opportunities & threats	
Priority List: Summarise key priorities for action	

Vision and Values

	✓
How do you see your business in the future?	
Vision Statement: Summarise in short sentence	
What do you want to be known for?	
Values Statement: List guiding principles	

Purpose / Mission

	✓
Why does your business exist?	
Purpose Statement: Summarise in short sentence	

Goals

	✓
What are you trying to achieve?	
List goals	

Objectives

	✓
What measureable targets will you achieve, by when?	
List S.M.A.R.T Objectives	

Marketing Strategy

	✓
Who are your customers and competitors?	
What are your <i>products/services</i> ; how & where will you sell them (<i>place</i>); what <i>price</i> will you charge; how will you <i>promote</i> them?	
How are you different and so better than your competitors? What does your customer get, of value to them, from you?	
Marketing Strategy: Summarise	

Business Strategies

	✓
How will you build and manage the business	
List Strategies	

Action Plan

	✓
What actions will you take, by when?	
List Actions	

Financials and Performance

	✓
What do you forecast for sales, costs, profitability and cash flow? What other measures will you monitor to gauge success?	
Produce Financial Forecasts and List Success Measures	