



**CERVITUDE**

# Business Plan Checklist

## About us

**Cervitude™ Intelligent Relations Consulting** specializes in business planning services, leveraging our extensive experience in professional business presentations to develop and deliver tailored business plans for public and private markets. Our experience in business plan development ranges from SBA Business Plans to Immigration Business Plans and more. Venture Capital and Private Equity groups alike have utilized our business planning and financial projections services to accomplish their goals. Our strategic on-call business plan consultants are ready to guide you through every stage of your business plan ensuring your objectives are met.

# Business Plan Checklist

Prepared by Cervitude LLC

*Business Planning, Investor Relations & Strategic Consulting*

This checklist includes every element that could be included in a **comprehensive, professional business plan** — use it to guide the structure, development, and depth of your plan.

## SECTION 1: EXECUTIVE SUMMARY

- Business Name, Structure, and Location
- Mission Statement
- Vision Statement
- Business Objectives & Milestones
- Summary of Products/Services
- Market Opportunity Summary
- Financial Snapshot (Revenue, Profit, Capital Needed)
- Funding Ask and Use of Funds
- Exit Strategy (if applicable)

## SECTION 2: COMPANY OVERVIEW

- Legal Entity Type (LLC, S-Corp, etc.)
- Ownership Structure & Equity Breakdown
- Founding Date and History
- Company Milestones & Achievements
- Location(s) and Facilities

- Company Values & Philosophy
- Long-Term Vision and Strategic Goals

### **SECTION 3: PRODUCTS & SERVICES**

- Detailed Description of Each Product or Service
- Features, Benefits, and Unique Selling Propositions
- Pricing Structure
- Production or Delivery Methods
- Intellectual Property (Patents, Trademarks, Copyrights)
- R&D Roadmap or Product Pipeline (if applicable)
- Customer Support, Warranties, or Guarantees
- Industry Certifications or Compliance

### **SECTION 4: INDUSTRY & MARKET ANALYSIS**

- Industry Overview & Current Trends
- Market Size (Global, National, Regional)
- Market Growth Projections
- Regulatory Environment
- Key Industry Players
- Competitive Landscape Overview
- SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)

## **SECTION 5: TARGET MARKET**

- Customer Segments / Buyer Personas
- Demographics, Psychographics, Behaviors
- Customer Needs and Pain Points
- How Customers Currently Solve the Problem
- Market Adoption Trends
- Customer Lifetime Value (LTV) & Acquisition Cost (CAC) Estimates
- Total Addressable Market (TAM), Serviceable Available Market (SAM), Serviceable Obtainable Market (SOM)

## **SECTION 6: COMPETITOR ANALYSIS**

- Direct Competitors
- Indirect Competitors
- Market Positioning Matrix
- Competitive Advantage (IP, Cost, Brand, Access)
- Barriers to Entry for New Competitors
- Comparison Table: Features, Pricing, Market Share

## **SECTION 7: MARKETING & SALES STRATEGY**

- Branding Strategy & Messaging
- Marketing Channels:
  - Digital (SEO, PPC, Social Media, Email, Influencers)
  - Traditional (TV, Radio, Print, Events)
- Go-to-Market Strategy (Launch Plan)

- Sales Funnel & Customer Journey
- Sales Tactics & Team Structure
- Promotions, Pricing Tiers, Discounts
- Strategic Partnerships or Affiliates
- Customer Retention Strategy

## **SECTION 8: OPERATIONS PLAN**

- Daily Operations & Workflow
- Fulfillment / Manufacturing / Service Delivery
- Inventory Management & Supply Chain
- Equipment and Technology Needed
- Facilities and Physical Assets
- Quality Control Processes
- Customer Service Protocols
- Key Vendors or Suppliers
- Sustainability or ESG Practices (if applicable)

## **SECTION 9: MANAGEMENT & ORGANIZATION**

- Founders, Partners, and Key Executives
- Organizational Chart
- Management Team Bios and Roles
- Hiring Plan and Headcount Forecast
- Compensation & Incentive Structures
- Advisors, Board Members, or Consultants

- HR Policies and Compliance Plans



## **SECTION 10: FINANCIAL PLAN**

- Assumptions Summary
- 5-Year Financial Projections:
  - Revenue Forecast
  - Cost of Goods Sold (COGS)
  - Operating Expenses
  - EBITDA
  - Net Income
- Break-Even Analysis
- Cash Flow Statement
- Balance Sheet (Projected)
- Profit & Loss (Income Statement)
- Capital Expenditure Plan
- Funding Requirements
- Use of Funds Breakdown
- Sensitivity or Scenario Analysis
- ROI or IRR (for investor presentations)



## **SECTION 11: FUNDING REQUEST (If Applicable)**

- Total Capital Needed
- Capital Structure (Equity/Debt Mix)
- Use of Funds
- Investment Terms (Valuation, % Equity Offered, Payback Period)

- Timeline for Capital Deployment
- Exit Strategy for Investors (Acquisition, Buyback, IPO)

## **SECTION 12: APPENDIX / SUPPORTING DOCUMENTS**

- Resumes of Founders & Key Staff
- Letters of Intent (LOIs) or Purchase Orders
- Product or Service Photos
- Market Research Data Sources
- Charts and Graphs
- Business Licenses or Permits
- Patents or Trademarks
- Strategic Partnership Agreements
- Contracts, MOUs, NDAs, or Legal Docs
- Technical Specifications
- Customer Testimonials or Case Studies
- Press Coverage or Media Mentions

## **BONUS: OPTIONAL SPECIALIZED SECTIONS** **(Depending on Purpose)**

### **For Franchising Plans**

- Franchise Model Overview
- Franchisee Support Structure
- Franchise Fee & Royalties

- FDD Summary

### **For Immigration Business Plans (E-2, L-1, EB-5, etc.)**

- USCIS-Compliant Organizational Charts
- Job Creation Timeline
- Evidence of Capital Investment
- Ownership Percentage Breakdown
- NAICS Industry Codes

### **For M&A or Investor Pitch Deck Integration**

- Valuation Justification
- Cap Table / Equity Ownership
- Synergies with Buyer or Investor
- Acquisition Targets or Roll-Up Strategy

**Disclaimer:** This checklist provides a general overview of parts to include in a business plan. Specific requirements and the order of specific sections of a business plan may vary depending on your industry, location, business model and the business plan's specific purpose. Always consult with relevant professionals for tailored advice. Visit [Cervitude.com](https://www.cervitude.com) for more information.

**Good luck on your entrepreneurial journey!**