

**Small Business Written Business Plan Scorecard**

Team:

Judge:

Total Score: 0

Using this rating system, please evaluate the written plan on the following aspects using the blue score boxes:

0 = not addressed, 1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree, 5 = strongly agree

|   |   |       |           |
|---|---|-------|-----------|
| <b>Executive Summary</b>                  |   | Score | Comments: |
| 1   | The executive summary is clear, concise, and communicates the overall new business opportunity in context of an integrated market, product/service, capital, and execution prospective. The executive summary can function as a stand-alone document. |       |           |
| <b>Business Description</b>               |   | Score | Comments: |
|   | Contains a brief historical background of the business, the customer benefits associated with the innovative product/service offering, and the vision for the business.   |       |           |
| 2   | Provides an understanding of the organizational structure and history of the business, including past and current funding methods.  |       |           |
| 3   | Identifies a realistic unmet market need for the product/service being offered and highlights an innovative product or service to satisfy this need.  |       |           |
| <b>Market Analysis</b>                    |   | Score | Comments: |
|   | Describes the overall marketing plan of the company.  |       |           |
| 4   | The customer problem and a superior innovative solution is clearly identified and well described.   |       |           |
| 5   | The intended target market niche and early customer adopters (or first movers) is clearly defined.  |       |           |
| 6   | Differentiates the superiority of the innovative product/service over competitors.  |       |           |
| 7   | The aggregate market is sufficient to sustain operations and presents significant future growth potential.  |       |           |
| <b>Competition and Marketing Strategy</b> |   | Score | Comments: |
|   | Describes the unique competitive advantages of the company.   |       |           |
| 8   | The nature of the competition is clear and detailed, and includes potential risks and challenges they may present.  |       |           |

|                                    |   |       |           |
|------------------------------------|---|-------|-----------|
| 9                                  | The sales & distribution channel is aligned with the customer purchasing preferences or process.  |       |           |
| 10                                 | The company's go-to-market strategy is thorough, organized, easy to follow, and feasible.   |       |           |
| 11                                 | The company's sales and marketing strategy will establish a strong competitive position in the target market.   |       |           |
| <b>Operations</b>                  |   | Score | Comments: |
|                                    | Describes the issues included in the operational plan.  |       |           |
| 12                                 | The current, along with any incremental, development stage of the product or service is clearly identified and any associated risks and/or barriers, such as regulatory approvals.        |       |           |
| 13                                 | The current ability and/or any incremental operational plans exist, either internally or via outsourcing, to commercially produce the product or service and related costs are realistic. |       |           |
| 14                                 | Post product or service sale customer service and/or support functions exist to ensure the ongoing product or service reputation of the business.   |       |           |
| <b>Organization and Management</b> |   | Score | Comments: |
|                                    | Describes the structure of the business and includes current and projected key members' backgrounds and responsibilities.   |       |           |
| 15                                 | The management team, current and planned future hires, has the necessary breadth of business experience & skills, and appropriate industry experience to manage the growing business.     |       |           |
| 16                                 | The overall staffing plan, current and planned employee hires, is realistic and correlates with the projected business expansion and corresponding required skill sets.                   |       |           |
| 17                                 | Corporate governance, relative to the business size, has been adequately addressed.   |       |           |
| <b>Financial Plan</b>              |   | Score | Comments: |
|                                    | Describes the company's current and projected performance.  |       |           |
| 18                                 | The funding requirements, thru a Source & Use of Funds, are clear, well described and realistic.  |       |           |
| 19                                 | An integrated set, including an Income Statement, Balance Sheet, & Cash Flow Statement, of annual financial projections for three to five years.  |       |           |
| 20                                 | Key financial assumptions, covering both the Income Statement and Balance Sheet, are briefly summarized (Note: Key revenue related assumptions can be included in marketing section).     |       |           |

|                           |   |       |           |
|---------------------------|---|-------|-----------|
| 21                        | All the capital acquisition valuations, the terms & conditions associated with the required capital, and potential returns, including Exit alternatives for equity capital, are reasonable. |       | Comments: |
| <b>Overall Impression</b> |   |       |           |
|                           | Rate your overall impression of the concept, viability of the business, management team strength, market dynamic and investment criteria.   | Score |           |
| 22                        | The business opportunity as proposed is reasonable, realistic, and achievable.  |       |           |
| 23                        | The business opportunity as proposed addresses the need of the customers, the employees, vendors, business partners, and shareholders.  |       |           |