SAMS
CONTRACTING CONSULTING AND TRAINING
Start • Build • Grow • Manage

BUSINESS PLAN QUESTIONS:

1. WHAT IS THE MISSION OF YOUR COMPANY? WHY DID YOU START IT? WHAT PROBLEM OR CHALLENGE IS YOUR COMPANY SET UP TO REMEDY?

2. WHAT IS YOUR VISION FOR YOUR COMPANY? WHAT DO YOU WANT YOUR COMPANY TO BECOME IN THE FUTURE? WHAT WOULD HAVE HAPPEN IN ORDER FOR YOU TO CONSIDER YOUR COMPANY A SUCCESS?

3. WHAT ARE YOUR COMPANY VALUES? WHAT ELEMENTS AND PRINCIPLES ARE IMPORTANT TO THE WAY THAT YOU RUN AND OPERATE YOUR BUSINESS?

4. WHO ARE THE OWNERS OF THE COMPANY & THEIR EDUCATION? HOW MUCH EXPERIENCE DO THEY HAVE IN THE INDUSTRY? WHAT IS THE COMPANY'S ORGANIZATIONAL STRUCTURE (LLC , CORP,ETC). WHERE IS THE COMPANY LOCATED? FOR THE LAST 2 YEARS (If Applicable):

- WHAT WAS YOUR ANNUAL REVENUE FOR EACH YEAR?
- HOW MUCH NET INCOME DID YOU HAVE REMAINING AFTER EACH YEAR?

5. DESCRIBE THE PRODUCTS/SERVICES OFFERED BY YOUR COMPANY?

6. DESCRIBE YOUR PRICING MODEL AND WHAT YOU WILL CHARGE FOR YOUR PRODUCTS/SERVICES? HOW MUCH PROFIT DO YOU INTEND TO MAKE OFF OF YOUR OFFERED PRODUCTS/SERVICES?

7. WHAT SEGMENT MAKES UP YOUR CURRENT CUSTOMERS/CLIENTS? WHAT CUSTOMER/CLIENT SEGMENTS WOULD YOU LIKE TO EXPAND INTO IN THE FUTURE?

8. HOW MUCH IN FINANCING ARE YOU SEEKING, AND WHAT WILL THE CAPITAL BE USED FOR? ESTIMATE YOUR START UP EXPENSES IN THE FOLLOWING AREAS:

START UP EXPENSE	**COST**
Land	
Renovations/Remodel/New Construction	
Lease/Rent (6 months)	
Furnishings/Fixtures/Equipment	
Signage	
Initial Inventory of Products	
Utilities (6 months)	
Payroll (6 months)	
Marketing & Advertising Expenses (6 months)	
Insurance (6 months)	
Professional Services (6 months: Consultants, Bookkeepers, Lawyers, etc.)	
Phone/Internet (6 Months)	
Office Supplies and Expenses	
Uniforms	
SUBTOTAL OF START UP EXPENSES	
Unplanned Expenses/Contingencies (10% of Subtotal)	
TOTAL START UP EXPENSES	

9. SHORT TERM GOALS

TWO YEARS FROM NOW:

- HOW MUCH IN ANNUAL REVENUE DO YOU PROJECT?
- HOW MUCH PROFIT/NET INCOME DO YOU PROJECT?
- HOW MUCH DO YOU PROJECT IN HAVING AVAILABLE AS WORKING CAPITAL?
- HOW MANY EMPLOYEES WOULD YOU LIKE TO HAVE ON STAFF/WHAT POSITIONS?
- HOW MANY CLIENTS WOULD YOU LIKE TO HAVE AND WHICH ONES?
- WHAT COMMERCIAL REAL ESTATE WILL YOU NEED TO ACQUIRE?
- WHAT TECHNOLOGY/SOFTWARE WILL YOU NEED TO ACQUIRE?
- WHAT EQUIPMENT WILL YOU NEED TO ACQUIRE?
- LIST ANY OTHER GOALS FOR YOUR COMPANY

10. LONG TERM GOALS

FIVE YEARS FROM NOW:

- HOW MUCH IN ANNUAL REVENUE DO YOU PROJECT?
- HOW MUCH PROFIT/NET INCOME DO YOU PROJECT?
- HOW MUCH DO YOU PROJECT IN HAVING AVAILABLE AS WORKING CAPITAL?
- HOW MANY EMPLOYEES WOULD YOU LIKE TO HAVE ON STAFF/WHAT POSITIONS?
- HOW MANY CLIENTS WOULD YOU LIKE TO HAVE AND WHICH ONES?
- WHAT COMMERCIAL REAL ESTATE WILL YOU NEED TO ACQUIRE?
- WHAT TECHNOLOGY/SOFTWARE WILL YOU NEED TO ACQUIRE?
- WHAT EQUIPMENT WILL YOU NEED TO ACQUIRE?
- LIST ANY OTHER GOALS FOR YOUR COMPANY

11. WHO ARE THE MANAGERS IN YOUR COMPANY/WHAT IS THEIR BACKGROUND (PROVIDE RESUME, OR SUPPLY WORK HISTORY, EXPERIENCE, EDUCATIONS, CERTIFICATIONS, ETC)

WHO PERFORMS THESE MANAGERIAL DUTIES & HOW THEY PERFORMED?

- BOOKKEEPING/ACCOUNTING
- HUMAN RESOURCES
- BUSINESS DEVELOPMENT/ADVERTISING/PROPOSAL WRITING
- PROJECT MANAGEMENT/SUPERVISION OF WORKERS
- PURCHASING

12. HOW MANY CURRENT EMPLOYEES DO YOU HAVE ON PAYROLL? WHAT IS THEIR JOB TITLE? WHAT IS THEIR ANNUAL SALARY?

13. HOW MANY FUTURE EMPLOYEES DO YOU PROJECT IN THE NEXT TWO YEARS TO HAVE ON PAYROLL? WHAT WILL BE THERE JOB TITLE? WHAT WILL BE THEIR ANNUAL SALARY?

14. HOW DOES YOUR COMPANY CURRENTLY MARKET ITS PRODUCTS/SERVICES TO CUSTOMERS, SPECIFICALLY IN THE AREAS OF:

- WEBSITE
- SOCIAL MEDIA
- PRINT MEDIA/PUBLICATIONS
- CHAMBERS OF COMMERCE/NETWORKING ORGANIZATIONS
- STRATEGIC PARTNERSHIPS
- NETWORKING

15. WHAT IS YOUR COMPANY'S BACK UP PLAN IN THE EVEN THAT EACH OF THE OWNERS/MANAGERS IS NOT ABLE TO PERFORM THEIR DUTIES BECAUSE OF A LEAVE OF ABSENCE? WHO WILL STEP IN AND TAKE THEIR PLACE? HOW ARE YOU PREPARING YOUR CURRENT WORKFORCE TO STEP UP IN THESE INSTANCES?

16. WHAT DO YOU FEEL ARE YOUR COMPANY'S STRENGTHS?

17. WHAT DO YOU FEEL ARE YOUR COMPANY'S WEAKNESSES?

18. WHO ARE YOUR TOP 5 COMPETITIORS:

COMPANY #1

- Describe how your company compares to them in terms of pricing, location, quality of service, reputation, etc. Identify why customers would select your company over this competitor.

COMPANY #2

- Describe how your company compares to them in terms of pricing, location, quality of service, reputation, etc. Identify why customers would select your company over this competitor.

COMPANY #3

- Describe how your company compares to them in terms of pricing, location, quality of service, reputation, etc. Identify why customers would select your company over this competitor.

COMPANY #4

- Describe how your company compares to them in terms of pricing, location, quality of service, reputation, etc. Identify why customers would select your company over this competitor.

COMPANY#5

- Describe how your company compares to them in terms of pricing, location, quality of service, reputation, etc. Identify why customers would select your company over this competitor.

19. WHAT SPECIFIC STEPS OR TASKS NEED TO BE COMPLETED IN ORDER FOR YOUR COMPANY TO ACHIEVE YOUR LONG-TERM GOALS?

- STEP 1
- STEP 2
- STEP 3
- STEP 4
- STEP 5
- STEP 6
- STEP 7
- STEP 8
- STEP 9
- STEP 10

For assistance with your business plan, please contact:

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