



Business Plan Checklist

Written by WeBC

Please note that the elements of your business plan might vary depending on the nature of your business and, in some cases, your lender's requirements. For a list of resources to help you develop each of the areas outline below, please refer to our [Business Plan Resources Guide](#).

Check out the [WeBC business resource library](#) to help you through each section.

SECTION	HAVE YOU INCLUDED?
<input type="checkbox"/> 1. Executive Summary	<ul style="list-style-type: none">• Max one-page summary of key points covered in your plan (including high-level description of your company and its products/services, proposed sources and use of funds, competitive advantage)
<input type="checkbox"/> 2. Description of Company	<ul style="list-style-type: none">• Nature of business• Brief history of business (including when and by whom it was started, company structure)• Company size and location (relative to your market)
<input type="checkbox"/> 3. Description of Product/Service	<ul style="list-style-type: none">• Key features and benefits• Pricing
<input type="checkbox"/> 4. Market Analysis	<ul style="list-style-type: none">• Industry analysis (including trends, opportunities and threats, competitive analysis, main competitors, etc.)• Market research (proof that there is demand for your product/service)

	<ul style="list-style-type: none"> ● Target market (who your typical customers are, how they behave, their characteristics) ● Market niche
<input type="checkbox"/> 5. Marketing Plan	<ul style="list-style-type: none"> ● Pricing ● Product positioning ● Promotion/advertising ● Sales and distribution
<input type="checkbox"/> 6. Operations	<ul style="list-style-type: none"> ● Production or procurement (describe the processes required to run the business) ● Inventory management ● Personnel ● Others (e.g. hours of operation, licenses and permits required, one-year action plan, etc.)
<input type="checkbox"/> 7. Financial Plan	<ul style="list-style-type: none"> ● Historic financial statements (if it is an existing business) ● Financial projections (cash flow projections for a minimum of 12 months based on unit sales forecast; if possible, include sensitivity analysis) ● Financing requirements & capital purchases (including funds required, use of funds, proposed repayment terms) ● Break-even analysis ● Accounts payable and receivable
<input type="checkbox"/> 8. Risk Analysis and Contingency Plan	<ul style="list-style-type: none"> ● Competitive reaction ● External risks ● Internal risks ● Risk management & contingency plans
<input type="checkbox"/> 9. Supporting Materials	<ul style="list-style-type: none"> ● You can include photographs of the product or space, resumes of the key members of the management team, letters of intent, letters of support, etc.

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