

## Business Plan Scorecard - BUS477 / ENSC201

<b>Executive Summary</b> <ul style="list-style-type: none"> <li>• clear, exciting, effective as standalone overview of the plan</li> <li>• includes a brief description of each following section of the plan</li> <li>• can be read in 5 minutes or less</li> </ul>	10	
<b>Company Overview</b> <ul style="list-style-type: none"> <li>• presents a vision, current status, strategy, goals, mission, objectives for the business</li> </ul>	5	
<b>Management</b> <ul style="list-style-type: none"> <li>• credible management team, roles, bios</li> <li>• team structure, equity allocation noted</li> <li>• credible boards, bios</li> </ul>	5	
<b>Critical risks</b> <ul style="list-style-type: none"> <li>• major internal and external risks that could threaten business</li> <li>• identifies contingencies</li> </ul>	5	
<b>Value Proposition</b> <ul style="list-style-type: none"> <li>• clear, concise</li> <li>• is there is real pain and does this plan solve it?</li> <li>• client validation. Market survey?</li> </ul>	5	
<b>Products and Services</b> <ul style="list-style-type: none"> <li>• describes key features and benefits, current stage of development, description, features and benefits, pricing, follow-on products</li> </ul>	10	
<b>Market</b> <ul style="list-style-type: none"> <li>• market need, specific target markets clearly defined?</li> <li>• clear promotional strategy for taking advantage of the market?</li> <li>• distribution channels identified?</li> <li>• current and projected market shares identified?</li> </ul>	10	
<b>Competition</b> <ul style="list-style-type: none"> <li>• competitors identified</li> <li>• differentiation articulated</li> </ul>	5	
<b>Operations</b> <ul style="list-style-type: none"> <li>• implementation milestones/phases identified (dates? measurable accomplishments?)</li> <li>• identifies facilities, HR, licenses</li> </ul>	5	
<b>Product/IP</b> <ul style="list-style-type: none"> <li>• ROI for customers identified</li> <li>• barriers to entry identified (e.g. patents)</li> </ul>	5	
<b>Finance</b> <ul style="list-style-type: none"> <li>• cash flow, balance sheet and income statement for 5 years</li> <li>• key ratios, break-even, average cost/unit identified</li> <li>• comparable businesses identified for valuation</li> <li>• easy to read and understand</li> </ul>	10	
<b>Offering</b> <ul style="list-style-type: none"> <li>• specific amount asked for</li> <li>• % of company identified</li> <li>• valuation is reasonable</li> <li>• use of proceeds identified</li> <li>• possible exit strategy identified</li> </ul>	5	
Sub-Total / 80		

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<b>Exceptional Content</b> <ul style="list-style-type: none"> <li>• goes beyond expectations with depth of research, includes relevant appendices</li> </ul>	10	
<b>Style / Mechanics</b> <ul style="list-style-type: none"> <li>• Format (5%) Important data is referenced, effective formatting, neat</li> <li>• Readability (5%) Good sentence structure, appropriate business tone</li> </ul>	10	
<b>Spelling/Grammar</b> <ul style="list-style-type: none"> <li>• Less: 2% for obvious spelling mistakes</li> <li>• Less: 3% for grammar</li> </ul>		
Total / 100		
Total / 40		
Plan strengths		
Areas for improvement		