



Gladiator<sup>CMO</sup>



CHECKLIST

# Business Plan

TRANSFORM YOUR BUSINESS GOALS  
INTO TARGETED VICTORIES



Your business plan forms the foundation of your company and is arguably your most important asset in aligning your team around common goals. But Google “what goes into a business plan?” and you’ll find a lot of different answers.

We have compiled a checklist for you of the most important pieces to include based on working with startups, small businesses, and established enterprises. Over the past five years, Gladiator Consulting has helped dozens of businesses grow via our Business Planning and Fractional CMO services. We want to help you reach your goals too. Enjoy!

## **Kristine Bryant, CEO**

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# Business Plan Checklist

## EXECUTIVE SUMMARY

The purpose here is to give a quick snapshot of your plan to people who aren't going to read the whole thing. Adjust the level of detail to what works best for you, but ideally it shouldn't be more than one page in length.

- Goals
- Short summaries of each section (optional)

## BUSINESS DESCRIPTION

- Mission
- Vision
- Values
- Company Bio or Elevator Pitch

## PRODUCTS/SERVICES

- Definition of each product or service
- Key differentiators
- Order of priority

## MARKET & COMPETITIVE ANALYSIS

- Industry trends and projections
- Geographic market trends and conditions (as needed)
- Regulatory environment
- Other external factors that influence the business
- Competitor analysis
  - Size
  - Revenue
  - Markets
  - Products/Services
  - Messaging

## POSITIONING

- Target markets
  - Company characteristics
  - Industries (to target and to avoid)
  - Buyer roles
  - Catalysts
- Your differentiators by market
- Company SWOT analysis
  - Strengths
  - Weaknesses
  - Opportunities
  - Threats



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## MARKETING & SALES

We prefer to build a detailed marketing plan as a separate document and link to it in the business plan. However you structure this, you will need to cover at least:

- Marketing goals
- Sales goals
- Buyer journey outline
- Key messages (mapped to the buyer journey)
- Prioritized marketing and sales activities to facilitate each stage of the buyer journey, can include:
  - Website optimizations
  - Thought leadership
  - Advertising
  - Event and organization participation
  - Email marketing
  - Video
  - Social media
  - SEO
  - PR
  - Collateral
  - Partnerships
  - Referral marketing
  - Retention activities

## OPERATIONS

Document key processes, expectations, and policies as they are important to your business regarding:

- Labor
- Facilities and locations (including digital ones)
- Equipment and materials
  - Software
  - Technology platforms
- Products and services
  - Process
  - Quality
  - Billing

## MANAGEMENT & ORGANIZATION

- Current-state org chart
- Future-state functional org chart(s) to show what your organization structure should look like as you scale
- Staffing plan by year (or at least current and long-term personnel needs)
- Organizational culture (optional)

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## FINANCIAL ANALYSIS

This will look different depending on your revenue model.

- Income Statement (P&L) spreadsheet

  - Past 5 years (or whatever you have available)

  - Projections for next 5 years (level of detail can vary)

- Financial assumptions

  - When you expect to add salaries

  - Operating cost assumptions

  - Capital investments

  - Launching new business lines

  - Sales assumptions

- Analysis by product/service line (as needed)

- Pricing analysis (as needed)

- Key metrics goals (these vary by revenue model and industry)

  - Revenue

  - Revenue per employee (professional services)

  - Revenue per hour

  - Profit margin

## 5-YEAR ROADMAP

- Goals

- Prioritized actions for each year to work toward these goals

- Key metrics to measure progress toward each goal

## Need More Guidance? Schedule a **Free Consultation.**

Writing or revising a business plan is a big undertaking. Whether you have questions about how to start, you are looking for a second set of eyes on your assumptions, or you just want someone else to do it for you – we are here to help.

**BOOK NOW**

**Schedule a free 30-minute strategy session with us and let's talk about your specific needs.**

