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Checklist: How to Write a Business Plan

See also [How to **Not** to Write a Business Plan](#)

Links within the checklist relate to the [Business Plan Guide](#)

How to Write a Business Plan		
Preliminary Tasks		Done
1.	Complete market research and analyses	<input type="checkbox"/>
2.	Clarify key matters relating to products/services and technology	<input type="checkbox"/>
3.	Form the basis of the management team	<input type="checkbox"/>
4.	Prepare a strategic plan as framework for detailed plan	<input type="checkbox"/>
5.	Decide the central purpose of the plan and its target audience	<input type="checkbox"/>
6.	Locate professional advisers to assist with the planning	<input type="checkbox"/>
7.	Acquire any software tools needed to help prepare the plan	<input type="checkbox"/>
8.	Research and compile a list of possible recipients of the plan	<input type="checkbox"/>
9.	Ascertain any specific needs of likely key recipients	<input type="checkbox"/>
Writing the Plan		Done
1.	Create a framework for the plan e.g. table of contents	<input type="checkbox"/>
2.	Identify possible appendices , attachments etc.	<input type="checkbox"/>
3.	Estimate page lengths for each key section	<input type="checkbox"/>
4.	List main issues and topics to be covered within key sections	<input type="checkbox"/>
5.	Assign work programs based on the framework and lists	<input type="checkbox"/>
6.	Draft preliminary sections (excluding summary) within the front of the plan	<input type="checkbox"/>
7.	Draft all key sections in the plan's body in a logical sequence	<input type="checkbox"/>
8.	Compile financial projections , funding proposals and related appendices	<input type="checkbox"/>
9.	Check the preliminary draft for completeness and plug gaps	<input type="checkbox"/>
10.	Stand back and take a detached overview of the draft	<input type="checkbox"/>
11.	Let an outsider or adviser critique the latest draft	<input type="checkbox"/>
12.	Redraft, fine tune and spell check	<input type="checkbox"/>
13.	Write the executive summary and plan's conclusion	<input type="checkbox"/>
14.	Get an independent assessment of the final draft	<input type="checkbox"/>
Reviewing the Plan		OK
1.	Is the plan nicely presented - bound, page numbered etc.?	<input type="checkbox"/>
2.	Has the plan been spell checked in its final form?	<input type="checkbox"/>
3.	Is the plan's length appropriate to its purpose ?	<input type="checkbox"/>

4.	Have the business's (funding) needs been clearly stated ?	<input type="checkbox"/>
5.	Does the plan's summary stimulate interest ?	<input type="checkbox"/>
6.	Have all key questions been anticipated ?	<input type="checkbox"/>
7.	What likely objections remain unresolved ?	<input type="checkbox"/>
8.	Will the plan provoke the desired responses?	<input type="checkbox"/>

Further guidance: [Writing a Business Plan](#), [Insights into Business Planning](#) and [Free-Plan](#).

For guidance on common mistakes, see the [How NOT to Write a Business Plan](#) checklist.

PlanWare, Invest-Tech Limited, Ardmeen Park, Blackrock, Co. Dublin, Ireland

International Tel:
+353-1-283 4083

International Fax:
+353-1-278 2391

E-mail:
info@planware.org

WWW:
<http://www.planware.org>

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