Business Plan Worksheets

Professor Murray Low
Professor Cliff Schorer
From a vast body of research and consulting experience, we know that:

Alignment → Performance
Alignment ⇐ Performance

Opportunity ⇐ Strategy ⇐ Execution
Opportunity

1. What is your big opportunity?

2. How big is it (define the market size)?

3. What are the critical factors that have created this opportunity?

4. What are the key insights that could lead to a visionary strategy?

5. Describe the purpose and vision for your company.

6. What is your stretch goal?
Visionary Strategy

- Customers
- Timing
- Economic Logic
- Competitive Advantage
- Offering
1. Define your future customers and segments.

2. Specify your future product and service offering.

3. What is your competitive advantage?

4. What is the economic logic of your business model?

5. Describe the speed and sequence of your strategic moves.
Alignment ➔ Performance

Opportunity ➔ Strategy ➔ Execution
1. What are your channels of distribution?

2. What is your pricing strategy?

3. What is your selling process, from prospecting to close?

4. How do you generate repeat sales?

5. What is your web and social media strategy?
Execution: Operations

1. What are the key activities?

2. What do you do in-house and what do you outsource?

3. Who are your key suppliers/partners?

4. How do you maintain quality?

5. How do you deliver customer service?

6. How do you maintain cost control?
1. *What are the key skills required?*

2. *Who is the leadership team?*

3. *What is the right organizational structure?*

4. *What is the right culture, and how is it created?*

5. *Who are your advisors?*
1. *What are the unit economics?*

2. *What is the overhead and capital equipment budget?*

3. *What are the sales projections?*

4. *How much capital is required for how long?*

5. *What is the potential long-term value creation?*

6. *Where will the investment come from?*
For the admission event, focus on:

1. Opportunity
2. Strategy
3. Team