

High School Business Plan Performance-Based Assessment Written Report Guidelines

Format and information to be included in the report:

Title Page

Name of report

Name of business

Authors: First names only (Do NOT include last names)

Table of Contents

Body Outline

I. Executive Summary - Financing Request

- A. Name of entity LLC
- B. Financing request
- C. Purpose of funds
- D. Milestones/follow-on funding needed?

II. Opportunity Recognition

A. Value Proposition (The Idea)

1. Solves a problem or results in gain?
2. Better mousetrap (better/faster/cheaper/stronger)?

B. Business/Market Opportunity Analysis

1. Potential Market Opportunity
 - a) Proof of Concept
 - Identify demographics of potential customers/businesses/consumers
 - Show market segment validation (interviews)
 - Pre-financing track record, pre-revenues?
 - Competitor or substitute track record
 - b) Available Market
 - Show research and data collected on market size and estimates of future growth
 - Explain the size of the available market based on identified purchaser demographics
 - c) External Variables
 - Explain any external variables (legal, political, global, trends, etc.) that provide opportunities to the venture

C. Target Market

1. Evaluate target market to determine the estimated average annual purchase per individual
2. Estimate distribution of market share among competitors
3. Estimate targeted market share

D. Competitive Analysis (including Threats, Strengths, Weaknesses)

1. Threats
 - a) Competitor Analysis and Grid
 - Identify the competition
 - Prepare competitor grid that compares key assets, knowledge, skills, etc.
 - b) Explain any external variables (legal, political, global, trends, etc.) that provide threats to the venture. Make special notation of suppliers/distributors.

2. Strengths
 - a) Identify and explain expected company strengths
3. Weaknesses
 - a) Identify and explain expected company weaknesses
4. Competitive Position
 - a) Explain how the company is positioned apart from its competitors based on the analysis in this section

E. Investment Opportunity

1. Financial Returns and Margins
 - a) Investor Returns
 - ROI or IRR for defined time period
 - Actual dollar returns and payback period
 - b) Sales/Revenues Growth
 - Sales - \$ and %
 - Customers - \$ and %
 - c) Compelling Margins
 - gross margins %
 - profit margins %
2. Exit Strategy - Best & Timing
 - a) Vision of where the company will be in five years
 - b) Based on research, product maturation and investors' priorities

III. Management

A. Mission Statement and Core Values

1. State mission statement or company mantra
2. State core values of company

B. Executive Management Structure & Responsibilities

1. Chart of Ownership/Managerial Responsibilities
2. Qualifications and Commitment of Owners/Executive Management
3. Future positions to be filled, if any

C. Operational Organizational Structure

1. Chart of Operational Responsibilities

IV. Operations

A. Operations (Nuts and Bolts)

1. Flow Chart (from start to finish)
2. Efficient Employment of Resources (Labor, Equipment, Supplies, Location)

B. Distribution (How Do You Get it to the Customer)

1. Channels of Distribution
2. Supply Chain Management
3. Customer Acquisition Costs

V. Financing and Capitalization

- A. Cash Flows - 5 to 10 Years
- B. Income Statement - 5 to 10 Years
- C. Gross Margin Analysis
- D. Break Even Analysis
- E. Detailed Cost Analysis and Cash Burn - Monthly for Two Years
- F. Capitalization Structure

VI. Marketing and Sales Strategy

- A. Identify methods the company will use to promote its products or service

Appendices

- A. References - Use APA format
- B. Full Financials (including monthly cash flows and income statements)
- C. Assumptions to Financials
- D. Owners' Resumes
- E. Vision Statement and Goals
- F. Research Data
- G. Collateral Materials and Pictures

High School Business Plan Performance-Based Assessment Written Report Formatting Standards

- ✓ The body of the written entry must be limited to 15 numbered pages. (The title page, table of contents, references and appendices are NOT included in the 15 pages.)
- ✓ Text must be in 12 point, Times New Roman font.
- ✓ Margins should be 1.5 inches on the left, and 1 inch on the right, top and bottom.
- ✓ Headings and subheadings should be used.
- ✓ Page numbers should be indicated in the Table of Contents.
- ✓ Pages must be numbered in sequence, starting with the executive summary and ending with the final page of the appendix.
- ✓ Lines should be double-space typed, except in the cases of charts, lists, etc.
- ✓ Pages must be 8.5 inches by 11 inches.
- ✓ Tables and charts may be used throughout the report.
- ✓ Plagiarism of information will result in disqualification. Use of outside information must be cited.
- ✓ APA standards for citations and references must be used.

Entries must follow the provided Written Report Outline.

Any additional or missing information will result in deduction of points.