Checklist 3: Writing Your Business Plan

Project Name: _____ Date: _____

A business plan is essential for any business in that it helps define your business identity and further allows you to determine your value proposition. Before spending money on your agency, it is essential to come up with a workable plan that helps you envision your agency in terms of the nature of products and services you want to offer, the structure of your agency, as well as your ideal clients and how to go about getting clients. This checklist highlights the factors to consider when writing a business plan for your agency.

		Yes	*No*
	Stage 1 – Executive Summary		
1	Come up with your agency name and a tagline for your business	☐	☐
2	Determine your products/services	☐	☐
3	Include your financial projections	☐	☐
4	Define your ideal clients or target market	☐	☐
5	Highlight your team (if any)	☐	☐
	Section 2 – The Opportunity		
6	Research your target market's pain points	☐	☐
7	Determine what problems your products/services seek to solve	☐	☐
8	Include your USP	☐	☐
9	Determine the size of your target market	☐	☐

Notes

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10	Identify the threats and opportunities in the market	☐	☐
11	Highlight your traction and milestones	☐	☐
12	Identify and research your competitors	☐	☐
13	Identify key risks and assumptions	☐	☐
	Section 3 – Marketing, Sales Plan, and Financials		
14	Determine your pricing strategy	☐	☐
15	Select your marketing and sales channels	☐	☐
16	Set up your monthly revenue goal	☐	☐
17	Approximate the number of new or repeat clients or sales you need to meet your revenue goal	☐	☐
18	Detail how you intend to fulfill your production and service offering	☐	☐
19	Identify the key players in your production team	☐	☐
20	Determine your agency structure	☐	☐

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