



Business Plan Questionnaire

1. Product/Service

- a. Services/products provided:
- b. Days and hours of operations:
- c. Approximate number of clients/customers to be served per day:
- d. Service differentiation, how will you differ from your competitors?
- e. If you need a loan, how will the money be spent?

2. Market (use 2015 Hwy 101 corridor demographic report)

- a. Who are your customers?
- b. Where are they located?
- c. How many are there?
- d. Describe them – income, lifestyle, etc.:
- e. Why will the above customer want to buy your product/service?
- f. What is your expected share of this market? – How many customers do you expect to reach?
- g. Will the loan affect the share of the market you presently have (if you are already in business)?

3. Location of Business

- a. Explain where the business will be located:
- b. Is this location easily accessible by automobile traffic, foot traffic? Is it a congested area?



Business Plan Questionnaire

- c. Is there ample parking available for customers?
- d. What kinds of businesses are around your location or close by?
- e. Any other information to describe the facility?
- f. Include any maps showing the location of the business and the location of closest competitors.
- g. Provide details about the terms and conditions of your lease.

4. Competition

- a. Who are your primary competitors?
- b. How will you specifically differ from each?

5. Distribution

- a. How will you reach the people you sell to?
- b. Would you use sales representatives? Mail Order?
- c. How would you let people know about your product/service?
- d. Would you advertise? Where?
- e. Would you use any other methods? Social media, fliers, etc.:
- f. If you have any unique marketing ideas, please write them down under this category:

6. Sales

- a. What are your total estimated annual sales for the first year of operation?



Business Plan Questionnaire

- b. What will be your total cost of sales? (Cost of merchandise or materials)?
- c. What percentage of your sales is cost of sales?
- d. What is the basis for your cost of sales figure?
- e. What will your average total expenses (overhead) per month be?
- f. How much money do you need to draw per month for personal living expenses?
- g. How much will you have to sell to break even?
- h. What could seriously change these sales projections (changes in the economy, changes in demand, government regulations, etc.?)

7. Key Personnel

- a. Who will be in charge of the business operation?
- b. How many employees will you have? What positions/titles and pay rates:
- c. If appropriate, provide a staffing schedule:
- d. Describe the duties and qualifications of each position, including years of experience:
- e. Include the personal resume of any employee who will have any administrative responsibilities, such as manager or assistant manager or any other employee with authority in your business.
- f. Include information of d and e about the owners(s).