

Business Plan Questions

Use the answer to these questions to help you become more aware of your business so you can create a comprehensive business plan that works for you.

What does your current work look like? List your areas of work and the percentage of time devoted to them.

Describe your work habits, including time on the phone, meetings with customers, actual "work", administrative work, networking, hours spent in and out of the office, etc.

List thoughts and ideas about your customers in the past year. Who are your customers? What do you know about your customers?

Why did your customers use your services? What are your capabilities and resources?

Why didn't some people use your services? Why did you lose some customers, if any?

How did you get new customers in the past?

Describe your current marketing efforts. What has worked and not worked in your marketing plan to date?

What organizations do you want to belong to that might help you in your business?

What marketing material do you have? What does your company have to offer?

What kind of manager/supervisor/delegator are you?

What kind of staff do you have? What are their strengths? Weaknesses?

What is the biggest challenge for your business?

What are your business's objectives? What are your objectives?

What are your strengths and weaknesses?

What are the budget numbers you need to meet or exceed?

What is your mission statement?

What are your key values?

What do you want out of your business?

Goals for the next year are:

1. Income: _____

2. Retain:

3. Increase

4. Manage

How will you achieve these goals?

5. Actions with current customers:

6. Actions with past customers:

7. Actions to prospect new customers:

8. Actions to create referral sources:

9. Marketing Budget:

10. Actions related to management skills (delegation):