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The JaxWorks Business Startup Kit™

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Product Catalog

This product is designed for Excel 2003/2007/2010/2013.

> *I use Mother as a main tool and I am very pleased with it. I noticed that almost all your products are designed for ongoing businesses.*
>
> ***What about start ups?***
>
> AAE, Seattle, Washington

We have received dozens of e-mails similar to the one above asking when we were going to put together a product for the startup entrepreneur.

The biggest reason for this inattention is the staggering volume of free self-help on the Internet starting with the Small Business Administration and its field offices staffed with thousands of SCORE advisors and dozens of documents online.

Then, we received this e-mail in the Spring of 2007.

> *I need a simple-to-use guide that will intelligently steer me step-by-step through the business startup process. Ramp-up will be out 3 months.*
>
> ***Can you offer any advice?***
>
> PJM, Atlanta, Georgia

After months in incubation, our creative team has released ***The JaxWorks Business Startup Kit™ (J-Kit)***. In simplifying the startup process, they created 4 new startup tools plus several accessories.

Additionally, **J-Kit** is designed to be flexible so that you can jump at any point in your startup time-line.

If you will follow the steps below in sequence, you will be off to easing your initial startup jitters.

J-Kit gives you all of the most sensible set of tools available to startup a new business.

J-Kit Contents:
1) **The Business Audit System**
2) **The Dynamic Strategic Planner System**
3) **The Dynamic Small Business Manager Book** with 350 Templates *

> * ATTENTION: All 350 templates are now included in the product's installation file.

4) MS Word® Business Plan outline documents. *Each document references the required spreadsheets in their proper document location.*
   a) **The Business Plan Template for Startup Business**
   b) **The Business Plan Template for an Established Business**
   (For use after startup for capital infusion)
5) **The JaxWorks Business Planner System™**
   Designed for the Startup Business Plan Outline, the JaxWorks Business Planner System™ creates all of the Financial Spreadsheets needed for a successful business plan execution.
6) Additionally, we have included **4 PowerPoint® presentations** with one linked to The JaxWorks Business Planner™. **These are used in presentations to venture capitalists, banks, etc.**
7) **The JaxWorks Financial Advisor™**
   Designed for the Startup, this workbook creates a financial analysis of your business. We have also included 125 updated supplemental worksheets in the workbook. **This system is designed as an ongoing tool for monitoring your business after startup.**

Features:
- **J-Kit™** is "Printer Ready". All sheets pre-formatted.
- 190 worksheets
- Prints 226 pages
- Full open architecture allows you to customize to suit your needs.
- For Microsoft Office 2003 and compatible with Microsoft Office 2007.
- This product is a "Huge Bang for the Buck".

Minimum System Requirements:
Microsoft Office Excel 2003 system requirements
The following are minimum requirements:
1) Computer and processor Personal computer with an Intel Pentium 233-MHz or faster processor (Pentium III recommended)
2) Microsoft Windows 98 or Windows 2000 or Windows
3) Hard disk 180 MB of available hard-disk space; optional installation files cache (recommended) requires an additional 200 MB of available hard-disk space
4) Drive CD-ROM or DVD drive
5) Display Super VGA (800 × 600) or higher-resolution monitor
6) Microsoft Windows or Microsoft Windows 2000 with Service Pack 3 (SP3), Windows XP, or later

Folder Contents

Name	Type	Size
templates	File folder	
Business Audit.xls	Microsoft Excel 97-2003 Worksheet	175 KB
BusinessPlan.xls	Microsoft Excel 97-2003 Worksheet	1,155 KB
Dynamic Strategic Planner.xls	Microsoft Excel 97-2003 Worksheet	459 KB
FinancialAnalysis.xls	Microsoft Excel 97-2003 Worksheet	1,059 KB
manage.xls	Microsoft Excel 97-2003 Worksheet	4,423 KB
BusinessPlanner.ppt	Microsoft PowerPoint 97-2003 Presentation	363 KB
Presenting a business plan.ppt	Microsoft PowerPoint 97-2003 Presentation	40 KB
Presenting financial performance.ppt	Microsoft PowerPoint 97-2003 Presentation	39 KB
Quarterly Results.ppt	Microsoft PowerPoint 97-2003 Presentation	83 KB
Business Plan for an Established Business.doc	Microsoft Word 97 - 2003 Document	139 KB
Business Plan for Startup Business.doc	Microsoft Word 97 - 2003 Document	140 KB
The_Dynamic_Small_Business_Manager.pdf	PDF File	1,532 KB
license.txt	Text Document	3 KB
readme.txt	Text Document	1 KB

Product Details

Step 1: The Business Audit

If you really have a passion to start a new business *adventure* and carry it forward to success, there are some rules and disciplines that you must follow.

J-Kit assumes you have the *passion*, therefore, we have skipped some topics that many self-help programs include.

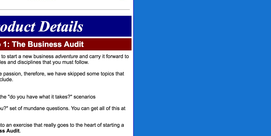
For example:
We don't drag you through the "do you have what it takes?" scenarios
or
"Is Entrepreneurship For You?" set of mundane questions. You can get all of this at the SBA website.

Rather, we drop you right into an exercise that really goes to the heart of starting a new business: **The Business Audit**.

You will not believe the value of this exercise until you start writing a business plan. The Business Audit is a dynamic instrument that you update as often as possible to measure your progress. ***Your score initially will be low, but as you progress, you will discover that you are doing real-time tasks the score rises, and so rises your success.***

Here are some sample screenshots of The Business Audit System

This explains our methodology.



BUSINESS AUDIT
Background

We have an owner business requests for a successful needs that would such the entrepreneur and jobs of several business assessment. The assessment and business plans are accomplishes and is a process.

Business Audit is a comprehensive business audit. **Business Audit** *is a process that has proved that most small businesses need consultants to help them obtain essential information for decision making, to develop and implement efforts, such as basic planning, general business practice, accounting, finance and loan procurement, advertising and promotion, production, and human resources management.*

Starting out on the basic operations, a lack of education, accountants, and financial professionals, can have created an audit system of any elements created and assembled into 3 categories:

1. **MANAGEMENT**
   - Business Plan
   - Personnel
2. **OPERATIONS**
   - Production
   - Sales and marketing
   - Advertising and promotion
3. **FINANCIAL**
   - Accounting bookkeeping and accounting practices
   - Financial planning and loan procurement

This audit prepares you for your Business Plan.

BUSINESS AUDIT

Instructions

There are two further steps:

1) **Clear Audit** - if we just that - clears all discriminants and uses source to zero.

2) **Sample Audit** - this solves a completed sample audit items.

Using the Freeze Pane/Split screen configuration you can monitor the score in real time as the audit checkmarks are entered.

Clear Audit | Sample Audit

Score - 4 72% Practice Answers - Good Scores are +70%

The Management Audit			2 to 4 Thru 20 (%)	Score Max (%)
1. Basic Planning				
	A.	The company has a clearly defined mission.	Yes No	Yes Yes
		1. There is a written mission statement.	Yes No	Yes Yes
		2. Company is carrying out the mission.	Yes No	Yes Yes
		3. Mission statement is modified when necessary.	Yes No	Yes Yes
		4. Employees understand & share in the mission.	Yes No	Yes Yes
	B.	The company has a written vision plan.	Yes No	Yes Yes
		1. Market niche has been identified.	Yes No	Yes Yes
		2. Other product lines are developed when appropriate.	Yes No	Yes Yes

The "Why do think?" of each task is explained here.

BUSINESS AUDIT ASSESSMENT

1. Basic Planning

A. Company (Business) Owner has a clearly defined mission.

What business are we in? It is surprising that control is major problem for many of the cases analyzed by the authors. Too often the owner/manager has started the business because of a hobby, employee variety experience, or family tradition. The business is built or its people sound employment is not an operational process for the question, although there may be true statements and ways of the business. Without a clear mission statement, the business is not focused on its customers, employees, and shareholders and is in needs of the. The mission statement is the foundation, and which the business is built. Without a mission statement, it is not the business.

1. There is a written mission statement.

This is an essential element of a good team application. Written mission statements are also useful for communicating to customers, employees and suppliers. They are the hallmarks of strong marketing and promotion efforts.

2. Company is carrying out the mission.

Are company control exercise its mission. It is probably being money and certainly not maximizing profits. If it is not accomplishing its mission, the business is not successful. Probably the corporation is being a waste and is not accomplishing that value mission.

3. Mission statement is modified when necessary.

Often a relative change of mission and not a strong business into a profitable one. An example of this is a company that realized its mission as that of a cleaning service, thereby accomplishing the owner's personal goal of making a good living.

4. Employees understand and share in the mission.

Confused employees, pilferage and poor customer relations are the results of employees who do not understand the mission of the business and thus they fill the void with their own mission statement. Employee morale is high and productivity is good.

B. Company has a written vision plan.

A written vision plan is essential for an effective marketing effort. It provides specific direction for the business and it is eventually

Step 2: Strategic Planning

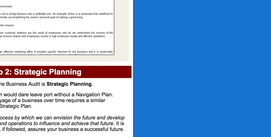
Following on the heels of The Business Audit is **Strategic Planning**.

No transatlantic ship captain would dare leave port without a Navigation Plan. Likewise, the successful voyage of a business over time requires a similar instrument. It is called The Strategic Plan.

The Strategic Plan is the process by which we can envision the future and develop the necessary procedures and operations to influence and achieve that future. It is the life-support system that, if followed, assures your business a successful future.

Here are some sample screenshots of The Strategic Planning System

This is your automated task list.



Strategic Plan Assessment

Assessment Sheet | Summary Sheet

1. Enter your business name in the cells with bold-line borders.
2. Enter a "Y" for "Yes" or "N" for "No" in the cells with the appropriate bold-line borders.
3. Enter the number of employees in the cells with the appropriate bold-line borders.
4. Enter the number of years the business has been in operation for the leading year calculation.

Business Name: Goodwill Computing & Equipment Company
Date: Monday, May 1, 2006
City: Monday, May 1, 2006

Row	No	Yes	Assessment
		Y	1. Have you developed a clear vision and mission for your company?
		Y	2. Have you developed your company's distinctive competence and identified its market position?
		Y	3. Have you assessed your firm's strengths and weaknesses?
		Y	4. Have you identified your firm's opportunities and threats? Have you identified your firm's strengths and weaknesses?
		Y	5. Have you identified the key factors for success in your business?
		Y	6. Have you analyzed your competitors?
		Y	7. Have you developed your marketing strategy? Have you developed your marketing plan?
		Y	8. Have you formulated strategic options and selected the appropriate strategies?
		Y	9. Have you translated strategic plans into action plans?
		Y	10. Have you established accurate controls?

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These are explanations for each step.

Step 1 - Create a Mission Statement

This step should be the firm's present position in the marketplace as well as suggests its future direction. The mission statement should be a concise statement of the business' purpose, and should include the firm's product or service, its markets, and its capabilities. The statement is designed for defining the scope of the business and should include definitions of the firm's product or service, its markets, and its capabilities. The statement should be clear and concise to allow those internal organizations most effectively, or essential, the mission statement is essential for successful operations.

Mission statements should be short, clear, and to the point. Ask yourself and your employees the following questions:

1. What are the basic needs and wants of your organization? What does your organization do?
2. Who are the company's target customers, and what are they like?
3. What are the company's products or services?
4. How can you define "quality" in your business?
5. What are the company's basic beliefs, values, and priorities? Is your corporate culture value?
6. What are the firm's basic products and services?
7. What are the firm's markets? Who are the firm's customers?
8. Where is your industry and/or image in your business?
9. Is your business a leader, a follower, or a niche player, or what is it and what it wants to be.

Sample mission statement of a small computing company.

To meet the operation of computing and engineering needs of private enterprises, high tech companies, financial institutions, government agencies, and educational institutions by providing quality computer equipment, software, and services to meet customer requirements most effectively, in essence, the mission statement is essential for successful operations.

Assessment Sheet | © Copyright, 2007, Jaxworks. All Rights Reserved | Step 1 Worksheet

This is your Automatically Posted Summary Analysis document.

Strategic Plan Summary Analysis

Quadrant Surveying & Equipment Company
600 Madison Drive
Hamilton, New York 13566

Mission Statement

This form is automatically by easy entry.
To enter your text, double-click inside the box and select the text with your mouse and start typing.
Use the Tab key to move from one box to the next, or click in the next box.
To left-justify text, double-click inside the box, and hit the Enter key to start a new line, then entering your text. Use the Tab key to move from one box to the next.
Text, hit the Enter key to finish.
Use the Tab key to move from one box to the next, select Format>Cells>Number Tab>Text.

The mission statement should not be so lengthy as to confine from the bottom of this box. Remember that "Less is More".

Driving Force

This form is automatically by easy entry.
To enter your text, double-click inside the box and select the text with your mouse and start typing. Your text will automatically wrap at the end of the right margin inside the box.
Use the Tab key to move from one box to the next.
To left-justify text, double-click inside the box, and hit the Enter key to start a new line, then entering your text. Use the Tab key to move from one box to the next.
Text, hit the Enter key to finish.
Use the Tab key to move from one box to the next, select Format>Cells>Number Tab>Text.

Step 3: Creating a Business Plan

Now that you have completed ***The Business Audit*** and ***Strategic Planner***, you have a clear vision as to the contents of your ***Business Plan***.

Want to know a secret?

Doing a Business Plan is not hard, in fact, you only have to do it once and update it periodically. It is a powerful tool for keeping your business on track.

To make things even easier we have included the book **"The Dynamic Small Business Manager"** and its 350 business templates. This book includes a section that tells you exactly how to build a **classic** business plan.

Step 4: Your Startup Tools

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> ATTENTION: Be sure to open this PDF book to download 350 additional files. Look for the notice "IMPORTANT NOTICE" on page xii and follow download instructions.

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Alphabetical Order	ALPHABETICAL	Workbook Order
12 Month Cash Flow	Direct Expenses Chart	Quarterly Income Chart
12 Month Income	Equity	Quarterly Sales Chart
12 Month Sales Forecast	Expenses Data Chart	Ratios
4 Year Profit Projection	Financial History & Ratios	Sales Data
Accounts Payable	Fixed Assets	Sales Data Capital Estimates
Assets Chart	Gross Profit Chart	Starting Expenses
Balance Sheet	Income	Starting Income
Balance Sheet Chart	Introduction	Support
Break Even	Investment Capital	Support Expenses Chart
Breakeven Analysis	Licence Agreement	Turnover Data Chart
Business Plan Sample	Master Data Entry	What-If Overview
Cash Flow Chart	Monthly Sales	What-If Period 1
Cash Flow Projections	Opening Day Balance Sheet	What-If Period 2
Cash Flow Projections Chart	Optimal Performance	What-If Period 3
Cash Flow Sheet	Organizational Expenses	What-If Period 4
Copyright	Proforma Balance	Working Capital Chart
Current Ratio Chart	Proforma Income	Year-End Tax Plan
Dashboard	Projected Balance Sheet	Zero Data

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The JaxWorks Financial Advisor ™ Table of Contents

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