

BUSINESS PLAN EVALUATION

Investor:	Company:	Telephone: () -	Email:
Entrepreneur:	Company:	Telephone: () -	Email:

1. Executive Summary		EXCELLENT	GOOD	ADEQUATE	FAIR	POOR
Clear, exciting, and effective as a stand-alone overview of the plan.		5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	
1 <input type="checkbox"/>						
Comments/questions:						
2. Company Overview		EXCELLENT	GOOD	ADEQUATE	FAIR	POOR
Presents a vision, history, business mission, current status, competitive strategy, goals, and objectives for the business.		5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	
1 <input type="checkbox"/>						
Comments/questions:						
3. Products or Services		EXCELLENT	GOOD	ADEQUATE	FAIR	POOR
Describes the key features and benefits, current stage of development, proprietary position, and competitive advantages of the product or service.		5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	
1 <input type="checkbox"/>						
Comments/questions:						
4. Market Analysis		EXCELLENT	GOOD	ADEQUATE	FAIR	POOR
Presents the growth trends and key driving forces of the industry; identifies the key characteristics and needs of the target market(s); assesses the competitive environment; details sales/promotion plan; demonstrates market acceptance for the product or service.		5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	
1 <input type="checkbox"/>						
Comments/questions:						

5. Management Team Backgrounds and roles of key individuals; history and ability to work as an effective team; personnel needs; organizational structure.	EXCELLENT 5 <input type="checkbox"/> 1 <input type="checkbox"/>	GOOD 4 <input type="checkbox"/>	ADEQUATE 3 <input type="checkbox"/>	FAIR 2 <input type="checkbox"/>	POOR
Comments/questions:					
6. Operating Strategies Addresses the marketing, production, R&D, personnel, administrative, and financial strategies for the proposed firm.	EXCELLENT 5 <input type="checkbox"/> 1 <input type="checkbox"/>	GOOD 4 <input type="checkbox"/>	ADEQUATE 3 <input type="checkbox"/>	FAIR 2 <input type="checkbox"/>	POOR
Comments/questions:					
7. Critical Risks Realistically identifies the major internal and external critical risks that could threaten the business and presents viable contingency plans to address these issues.	EXCELLENT 5 <input type="checkbox"/> 1 <input type="checkbox"/>	GOOD 4 <input type="checkbox"/>	ADEQUATE 3 <input type="checkbox"/>	FAIR 2 <input type="checkbox"/>	POOR
Comments/questions:					
8. Financial Statements Presents a realistic assessment of income statement, cash requirements-inflow and outflows-over a projected 5-year period; cash flows are consistent with operating and marketing strategies outlined in the body of the plan; cash flow information is detailed for first 2 years, quarterly/annually for years 3-5. Presents a realistic assessment of the working capital and fixed asset requirements of the business; appropriately reflects the projected capital structure of the business—long term debt and equity positions; balance sheet information is projected annually for 5 years.	EXCELLENT 5 <input type="checkbox"/> 1 <input type="checkbox"/>	GOOD 4 <input type="checkbox"/>	ADEQUATE 3 <input type="checkbox"/>	FAIR 2 <input type="checkbox"/>	POOR
Comments/questions:					

9. Funds Required/Used

Clear and concise presentation of amount, timing, type and use of funds required for venture.

Clearly articulates the proposal/terms to investors; identifies what entrepreneur is seeking from investors; states how much equity will be given up in return for investment capital; presents a realistic assessment of ROI potential; presents an appropriate deal structure and possible exit scenarios.

EXCELLENT GOOD ADEQUATE FAIR POOR

1 ☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐**Comments/questions:****Additional comments you wish to offer to the authors:**