

## Business Plan Evaluation Form

**Company:** \_\_\_\_\_  
**Evaluator(s):** \_\_\_\_\_  
**Date:** \_\_\_\_\_

Please evaluate the written business plan on the following criteria: 1=Poor, 2=Fair, 3=Adequate, 4=Good, 5=Excellent						Comments
1. Executive Summary (Required) [Clear, exciting, and effective as a stand-alone overview of the plan; includes brief description of each succeeding section of the plan; can be read in 5 minutes]	1	2	3	4	5	
2. Company Overview (5%) [Presents a vision, history, current status, strategy, goals, mission and objectives for the business]	1	2	3	4	5	
3. Products or Services (15%) [Describes the key features and benefits, current stage of development, proprietary position, and competitive advantages of the product or service]	1	2	3	4	5	
4. Market Analysis (15%) [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; demonstrates market acceptance for the product or service]	1	2	3	4	5	
5. Management Team (25%) [Provides background and roles of key individuals; history and ability to work as an effective team; personnel needs; organizational structure experiences: industry, financial, scientific, start-up. ]	1	2	3	4	5	
6. Operating Strategies (5%) [Addresses the marketing, production R&D, personnel, administrative, and financial strategies for the proposed firm]	1	2	3	4	5	
7. Critical Risks (5%) [Realistically identifies the major internal and external critical risks that could threaten the business and presents viable contingency plans for them]	1	2	3	4	5	

8. Cash Flow Statement (5%) ([Presents a realistic assessment of cash requirements-inflows 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]	1	2	3	4	5	
9. Income Statement (5%) [Demonstrates realistic and attractive income potential of the business; the income statement is consistent with the operating and marketing strategies outlined in the body of the plan; income statement information is detailed for first 2 years, quarterly/annual for years 3-5]	1	2	3	4	5	
10. Balance Sheet (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]	1	2	3	4	5	
11. Funds Required/Used (5%) [Clear and concise presentation of amount, timing, type and use of funds required for venture]	1	2	3	4	5	
12. Offering (10%) [Clearly articulates the proposal/terms to investors; identifies what entrepreneur is seeking from debt and/or equity 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]	1	2	3	4	5	
<b>TOTAL</b>						

**RECOMMENDED ACTION PLAN:** \_\_\_\_\_

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APPROVED BY: \_\_\_\_\_

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