

quickBIZplans



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Designed to assist future or current business owners, entrepreneurs or individuals who need a workable plan to run a business, manage a project or complete a goal. quickBIZplans helps create a solid foundation to achieve and manage your objectives in business and your personal life.

When completed quickBIZplans will be your roadmap to get you on track to where you want to go.

You are in the Driver's Seat with quickBIZplans.

At JBGmg our goal is to help you reach your destination and achieve your business and personal goals.



“Take a step to
“HELP YOU REACH YOUR GOALS”

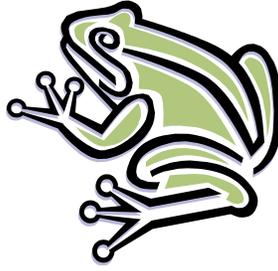
Contact JBGmg

Teaching, Coaching and Consulting Services for Small to Medium Size
Business Owners or Entrepreneurs.

Call us @ 562.810.8881
today Free initial consultations

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LETS GET STARTED

QUICKBIZPLANS

OVERVIEW

- 1) Name of your Business?
- 2) Location?
- 3) Please write out a brief summary and origin of your Business?
- 4) Why did you start the Business and who will be helping you: List Names & Roles ?
- 5) Primary Purpose & Goal for your Business?
- 6) List specific steps with dates needed to reach your goal or destination.
- 7) What Business are you in?
- 8) Who are your clients?
- 9) Where are your clients?
- 10) Why do your clients buy from you?
- 11) What benefits do your clients receive by buying your product or service from you versus your competitor?
- 12) What are the hours of your Business?
- 13) Does the Business supply you with adequate income at this time?.
- 14) What changes are needed to make the business supply your financial needs?

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MISSION STATEMENT

- 1) What is your Business mission statement -



EXECUTIVES / OWNERSHIP / MANAGEMENT / MANPOWER

- 1) Names of Executives
 - 2) % ownership for Each Key Executive
 - 3) Do you have a Staffing Plan
 - 4) List number of employees
 - 5) Job descriptions of all Executives and employees
- ** Keep files of all employees and Resumes of Key Personnel in organized files
- 6) Form of Business Organization
 - 7) Create Organization Chart
 - 8) Who will run and manage your business in your absence?



FACILITIES

- 1) Are your current facilities adequate to match your business plan requirements.
- 2) What are your facility needs either current or future?
- 3) List Projected Improvements and costs associated with improvements

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MARKET SHARE

- 1) What is the total Industry Market Dollars for your product or service-
- 2) What % of the market are your aiming for -



CUSTOMER BUYING CYCLES

- 1) What are the buying cycles for your product or service ? what is your busiest season? – If you owned a ski-resort it would be winter – you get the picture



INDUSTRY TRENDS

- 1) What are the trends in your Industry ?
- 2) Is your Business able to keep up with the Trends?
- 3) List any future technology that may hinder or help your future plans for the growth of your business -



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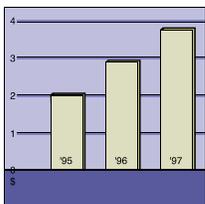
TARGET MARKET

- 1) Define your Target Market -
- 2) Define your geographic boundaries -
- 3) Define segment of the market you are you targeting by age , income or type of businesses



COMPETITION

- 1) Define and list names of competitors -
- 2) Strengths
- 3) Weaknesses



SALES PROJECTION

- 1) Projected Sales 1st Year -
- 2) Projected Sales for 2nd Year -
- 3) Projected Sales for 3rd Year

BUSINESS TRADE SECRETS, PATENTS ETC.

- 1) Does your Business own any Patents, Copyrights & Trademarks

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BUSINESS PHILOSOPHY

- 1) Is your Business Sales or Production Oriented ?

SALES STRATEGY COSTS & TOOLS

- 1) Describe the purpose of a salesperson in your company structure -
- 2) What is your overall Sales Strategy -
- 3) Do you use Direct Mail, Outside Salespersons, Reps, Telemarketers.
- 4) Create a Sales Budget and Plan for each area of your sales strategies.
- 5) What are your Sales Cost compared to Industry Ratios



PRICE , MARKUPS, FEES,

- 1) Define Price of your products or services as it relates to the success of your Business and Marketing Strategy
- 2) What percentage markups are you utilizing for the resale of products?
- 3) What are your Hourly Rates or Commission rates for Services ?



CREDIT, BILLING, TERMS, DISCOUNTS

- 1) Do you Extend Credit to your Clients?
- 2) Do you accept Charge Cards?
- 3) What are your billing terms?
- 4) Do you offer Discounts for Cash or payments in net 10 days?

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WARRANTIES

1) What type of Warranty or Guarantee do you provide with your Product or Service?



ADVERTISING PROMOTION PLANS

1) What is your Advertising / Promotion Plan

2) List Budget for Advertising Promotion and potential return ?



MANUFACTURING / DISTRIBUTION

1) Does your Business Buy Out or Manufacture Products and services in house

2) List sources you but from and why

3) If you manufacture in house and what are your hourly manufacturing rates and are you competitive based on Industry standards for hourly rates and production times.

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BUSINESS EQUIPMENT/LEASES

- 1) List all Equipment owned and present value of equipment
- 2) List all Leases for machinery or equipment and Real estate occupied by business

SKILLED LABOR MANPOWER

- 1) Does your business plan require skilled labor to perform necessary duties?
- 2) where do you intend to recruit and employ your labor pool.



QUALITY CONTROL

- 1) Do you have Quality Control Procedures in place for your Business
- 2) What is your Waste Reduction Plan
- 3) Who is responsible for maintaining quality control

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PAST & FUTURE FINANCIAL PERFORMANCE

- 1) Create a budget showing all Projected and Actual Income and Expenses
- 2) Record all Income & Expenses & Create Monthly Report for records
- 3) Collect and review Financial Statements (3 previous years to present)
- 4) Create a realistic 3 Year Future Business Plan Projection including cash flow projections
- 5) Projected sales this year
- 6) Projected Budgeted expenses this year
- 7) Projected Gross Profit this year
- 8) Projected Taxes this year
- 9) Projected Net Profit after taxes this year
- 10) Create your BALANCE SHEETS Cash available at the beginning and end of each month.
- 11) Evaluate your actual Income & Expenses versus your Projected Income & Expenses.
Use the information to make the necessary adjustments to formulate your projected Income & Expenses for the following year.

** Consult a Professional CPA or Accounting Firm regarding questions or matters pertaining to taxes, payroll issues and other accounting procedures

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BUSINESS PROBLEMS/ SOLUTIONS

- 1) What problems do you anticipate in reaching your business goals?
- 2) How will you overcome the problems as they arise in order reach your goals?
- 3) Note problems & deviations. Solve problems and keep deviations to a minimum.



MOTIVATION

- 1) Motivate yourself & your Team Monthly and Quarterly to reach your established goals. Celebrate your victories and learn from your failures

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REWARDS / INCENTIVES

1) Reward yourself and provide necessary incentives to yourself and your co-workers on your accomplishments in establishing and reaching your Business Goals.

CHANGES

1) Note any changes or adjustments that were made during the year in your plan that helped you reach your goals. Use the information to formulate your plan for the following year

EVALUATION

1) Always evaluate your business plan at year end and make adjustments as necessary



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congratulations you have completed your quickBIZplan

quickBIZplan WRITTEN BY

DATE

Taking the first step is always the most difficult step in the journey...Congratulations on taking a major step by completing a quickBIZplan

If you need any help in putting your plan together or have any questions please contact

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JBGmg

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