

Business Strategy Preparation Checklist



This checklist will help you organize and prepare for developing your business strategy. The information is the basis for understanding your current business situation and building future plans.

Instructions: For each topic indicate if the information is available and list the specific reports, documents, or supporting material you will gather together. We have provided examples of these items. Simply replace with your specific documentation or comments.

✓	Topic	List of example items / questions
	History of Business	Description and story of your business.
	Owner / management	Type of business structure and ownership.
	Staff: Overview	Key positions, employees, and roles, position descriptions, organizational chart
	Market Overview	Who are your customers, what area do you serve, how do you reach this group?
	Competitor Information	Who competes for your customers business?
	Product / Service Information	What do you sell? What do customers buy?
	Financial Reports (past 3 Years)	Income statements, balance sheet
	Budgets & Control	Business, marketing, sales forecasts
	Historical Growth Reports	Customers, products, geographic reports

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