

## Generals / Titles

- Name of company or products
- Date
- Optional: Document revision, version
- Confidentiality NDA, disclaimers
- Optional: Instructions to return the documents
- Optional: Author & key personnel CV's

**Table of Contents** (Document with anchors for easy navigation)

**Executive summary** (Graphic presentation)

- Document's highlights
- Resume of business strategy
- Goals of the document
- Summary pitch

**Opportunity / Business Case** (Graphic presentation)

**Business Model Design, Testing & Implementation** (Graphic tools)

**Technology** (Graphic presentation)

- Description of the technological environment
- Description of the technology unique advantages
  - ▷ Innovation Framework (VARIM, LIMIS)
- Lead time, brief patents description

## Research and Development

- R&D work plan, describing the work to be done in-house, outsourced, or bought from other parties
- R&D goals
- Schedule and tie frame for each of the R&D activities
- R&D staff required and their work plans
- Budget

## Management / Organizational Plan

- Organizational / Management structure and decision-making framework
- Manpower requirements (position analysis)
- Company's operations overview
- Company's management policies, compensation and benefits policies

### **Production Plan**

- Division of production between in-house production and subcontractors
- Production technologies to be used
- Detailed schedule of the equipment and raw materials required
- Physical location of the production plant
- Logistics and shipping considerations
- Purchasing policies
- Inventory policy
- Quality assurance processes
- Alternative supply routes
- Budget and estimations

### **Marketing Plan**

- Target markets based on market segmentation
- The product mix (portfolio of products and/or services offered)
- Distribution and marketing channels
- Advertising plan
- Pricing
- Customer credit policy
- Pre- and post-sales support and technical assistance, service and warranties.
- Business locations
- Brand and product names

### **Financial Plan**

- Master budget
  - ▷ Capital requirements for equipment, labor, inventory and activities
  - ▷ Capital structure
  - ▷ Financial forecasts
- Risk analysis

**Checklist questions for project validation.**

Do we understand the primary goal of the project?	
What are the business benefits derived from the project?	
What strategic goals does this project support and enable?	
What do we want to achieve and avoid?	
What are the project objectives: business, financial, organizational, social, etc.?	
Is there agreement and alignment on the objectives (in particular with the project sponsor)?	
Do we understand the problems we intend to solve?	
Is the problem clearly defined, differentiated, and documented?	
Do we understand the solution requirements?	
Do we understand the priorities of the solution requirements?	
Is the solution concept convincing and realistic?	
Are we ready to make a decision about the proposed solution concept?	
What are our base assumptions?	
Have we verified all our assumptions with our stakeholders?	
What are our project constraints?	
What are the boundaries and limitations?	
Do we have primary roles and responsibilities documented?	
Do we understand the project risks?	
Do we have mitigation plans for the high-impact, high-likelihood risks?	
What will serve as evidence of project success or failure?	
Are we ready to make a decision to transition to project planning?	
Can we justify the decision internally and externally?	