

BUSINESS GROWTH PLAN RUBRIC

Student Name: _____ Business Name: _____

| Section Name & Description | LITTLE / NO VALUE | BELOW EXPECTATIONS | MEETS EXPECTATIONS | How to earn MEETS EXPECTATIONS score: |
|---|-------------------|--------------------|--------------------|--|
| I. Executive Summary 1-3 page description of the business model | | | | Executive Summary gives a clear, compelling overview of the business model. Student utilizes charts, graphs, and/or other visuals to support overview as well as a brief summary of each section listed below. |
| II. Introduction See far right column for description | | | | In A, student identifies the type of business owned and operated and provides a thorough description of the current business operations. This should include, but is not limited to: the current business model, location of the business, and day-to-day operations. In B, student thoroughly describes products and/or services offered, providing visuals as needed. Student also identifies prices of each product/service. In C, student identifies and explains unique characteristics of the business. |
| III. SWOT Analysis See far right column for description | | | | In A, student identifies and thoroughly describes at least 2 strengths of the business. In B, student identifies and thoroughly describes at least 2 weaknesses of the business. In C, student identifies and thoroughly describes at least 2 opportunities of the business. In D, student identifies and thoroughly describes at least 2 threats of the business. |
| IV. Five Year Plan to Grow and Expand the Business See far right column for description | | | | In A, student outlines and thoroughly describes all planned expansion opportunities, providing a timeline of events over a five-year period. In B, student thoroughly analyzes the new market. This means that the student examines the new areas of expansion (e.g. examining the population of the city where the new retail location will be placed or the demographics of the new customer segment you're targeting), citing all sources. In C, student outlines and thoroughly describes each component of the marketing plan, providing a timeline of events over a five-year period. |
| V. Financing Plan See far right column for description | | | | In A, student outlines current financial situation, including overviews of all sources of revenue and expenses. Student must also include any pertinent financial documents of the business. In B, student provides a thorough overview of fixed overhead and cost of operations. This could include (for current business operations AND expansion opportunities), but is not limited to, the following: cost of goods sold sub-model, gross profit sub-model, fixed assets & depreciation sub-model, customer acquisition costs sub-model. In C, student explains the capital needed for expansion opportunities. This should include: a request for a loan plus an amortization schedule of the loan payment. In D, student provides an expected timeline to achieve profitability. This should include a graph displaying the projected profit over the 5-year |

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| | | | | timeline. In all sections above (A-D), student should refer to the income statement and cash flow statement (provided as appendices). |
| VI. Conclusion Summary of key points | | | | Student re-addresses the dollar amount needed for financing, explaining how the chosen loan amount will contribute to the business' prosperity. |
| VII. Bibliography | | | | Student includes a list of all the sources of information used in the written document. |
| Teacher Comments | | | | |

GRADING BREAKDOWN:

- A: 95% ('meets expectations' for all sections)
- B: 85% ('meets expectations' for only 70-80% of all sections, and the rest of the sections earn 'below expectations' scores; no sections earn 'little to no value' scores)
- C: 75% ('meets expectations' for less than 70% of all sections, and the rest of the sections earn 'below expectations' or 'little to no value' scores)