

## **BUSINESS HISTORY & MARKET SUMMARY**

In order to best represent your business in the application process, please provide the following information. If you already have a business plan, it can be substituted for this form. Be sure that the business plan addresses all the areas requested on this form. If not, use this form to address those specific items. Feel free to provide any additional information, which you feel is important in describing and explaining your business.

**BUSINESS NAME:** \_\_\_\_\_

### **THE DESCRIPTION AND HISTORY OF BUSINESS**

**A. What is the "essence" of the business and what makes it unique?**

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**B. When and why did it start?**

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**C. What have been its stages of growth?**

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**D. What are the company's strengths and weaknesses?**

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**E. What business moves are important this year and future years? (Provide timetable)**

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**THE PROJECT**

**A. Describe the proposed project, what will be purchased and need for financing.**

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**B. Project timetable.**

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**C. How will project help achieve the company's goals?**

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**THE PRODUCTS AND / OR SERVICES OF THE BUSINESS**

**A. Describe current product lines and/or services.**

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**B. Are you planning any new product and/or service offerings? If yes, describe.**

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**THE MARKET**

**A. Describe your company's market area.**

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**B. Is the market growing? shrinking? changing in emphasis?**  
*(include statistical and trade information supporting trends)*

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**C. Are your company's sales cyclical? Yes\_\_\_\_\_ No\_\_\_\_\_ If yes, describe the cycle.**

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**D. Describe who your company's customers are. (age, demographics, income, etc.)**

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**E. Identify specific competitors (direct and indirect) and their strengths and weaknesses.**

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**F. How have you addressed competition?**

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**THE MARKET STRATEGY**

**A. What is your company's niche in the market? How will you set yourself apart?**

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**B. Explain your company's pricing system.**

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**C. What sales methods are used and how do they help you to achieve your goals?**

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**D. What methods of advertising and promotion will be used and why will they work?**

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**THE OPERATION**

**A. Describe the current facility and any proposed changes.**

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**B. Describe the current staffing pattern and anticipated changes.**

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