



DATA REQUIRED TO COMMENCE THE PROJECT

Business plan
structure

Manda-
tory

Optional

Content
of documents

MARKET
OVERVIEW



	^	Data on current state of the market (segments, competitive environment)
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CURRENT
CLIENT
SITUATION



^		Overview of company products/services and price list
^		Description of product manufacturing/service development process
^		List of clients and distributors
^		Sales volume of products/services with a breakdown into segments
^		The company's organizational and legal structure
	^	Headcount dynamics over the past three years
	^	Utilization rate of production and logistics capacity



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of documents

STRATEGIC
GOALS AND
INITIATIVES



Manda- tory	Optional	Content of documents
	^	List of the company's current strategic and operational goals
^		Ongoing investment program (planned events/projects, budget)

KPIs



Manda- tory	Optional	Content of documents
	^	List of the major KPIs drilled down into specific metrics and process owners
^		Overview of employee incentive program

KEY FINANCIAL
INDICATORS



Manda- tory	Optional	Content of documents
^		Income statement (income and expense budget) and cash flow statement for the last three years (plan/actual)
^		Consolidated management/accounting report over the past three years