



PBL SMALL BUSINESS MANAGEMENT PLAN

Report Rating Sheet

Evaluation Item	Not Demonstrated	Does Not Meet Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Content					
Executive Summary <ul style="list-style-type: none"> Convinces reader business concept is sound and has a reasonable chance of success Is concise and effectively written 	0	1–7	8–14	15–20	
Company Description <ul style="list-style-type: none"> Legal form of business Effective date of business Company mission statement/vision Company governance Company location(s) Immediate development goals Overview of company's financial status 	0	1–7	8–14	15–20	
Industry Analysis <ul style="list-style-type: none"> Description of industry (size, growth rates, nature of competition, history) Trends and strategic opportunities within industry 	0	1–5	6–10	11–15	
Target Market <ul style="list-style-type: none"> Target market defined (size, growth potential, needs) Effective analysis of market's potential, current patterns, and sensitivities 	0	1–5	6–10	11–15	
Competition <ul style="list-style-type: none"> Key competitors identified Effective analysis of competitors' strengths and weaknesses Potential future competitors Barriers to entry for new competitors identified 	0	1–5	6–10	11–15	
Marketing Plan and Sales Strategy <ul style="list-style-type: none"> Key message to be communicated identified Options for message delivery identified and analyzed Sales procedures and methods defined 	0	1–5	6–10	11–15	
Operations <ul style="list-style-type: none"> Business facilities described Production plan defined and analyzed Workforce plan defined and analyzed Impact and use of technology 	0	1–5	6–10	11–15	
Management and Organization <ul style="list-style-type: none"> Key employees/principals identified and described Board of directors, advisory committee, consultants, and other human resources identified and described Plan for identifying, recruiting, and securing key participants described Compensation and incentives plan 	0	1–5	6–10	11–15	

(continued on next page)

Long-term Development <ul style="list-style-type: none"> Long-term goals identified and documented Risks and potential adverse results identified and analyzed Strategy in place to take business toward long-term goals 	0	1–5	6–10	11–15	
Financials <ul style="list-style-type: none"> Type of accounting system to be used is identified and realistic Reasonable financial projections, including monthly cash flow projections Financial assumptions clearly identified 	0	1–7	8–14	15–20	
Supporting Documents <ul style="list-style-type: none"> May include works cited page, certifications, licenses, tax requirements, codes, technical descriptions, advance contracts, endorsements, etc. 	0	1–5	6–10	11–15	
Report Format					
Clear and concise presentation with logical arrangements of information following the rating sheet categories	0	1–3	4–7	8–10	
Correct grammar, punctuation, spelling, and acceptable business style	0	1–3	4–7	8–10	
Subtotal					/200 max.
Penalty Deduct five (5) points each for not adhering to Report Guidelines (maximum of twenty [20] points): <input type="checkbox"/> cover incorrect <input type="checkbox"/> missing table of contents <input type="checkbox"/> over fifteen (15) pages, <input type="checkbox"/> no page numbers <input type="checkbox"/> report format does not follow rating sheet					
Total Points					/200 max.

Name(s): _____

School: _____ State: _____

Judge's Signature: _____ Date: _____

Judge's Comments:



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Performance Rating Sheet

☐ Preliminary Round☐ Final Round

Evaluation Item	Not Demonstrated	Does Not Meet Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Content					
Description of plan development and strategies used to implement plan	0	1–3	4–7	8–10	
Marketing aspects of business are thoroughly covered	0	1–3	4–7	8–10	
Description of operations and management plans	0	1–5	6–10	11–15	
Financial documents and projections are reasonable and easy to understand	0	1–5	6–10	11–15	
Risks are anticipated and analyzed	0	1–5	6–10	11–15	
Long-term goals are identified and reasonable	0	1–3	4–7	8–10	
Comments					
Delivery					
Statements are well organized and clearly stated; appropriate business language used	0	1–3	4–7	8–10	
Demonstrates self-confidence, poise, assertiveness, and good voice projection	0	1–2	3–4	5	
Demonstrates the ability to effectively answer questions	0	1–3	4–7	8–10	
Comments					
Subtotal					/100 max.
Time Penalty Deduct five (5) points for presentation over seven (7) minutes. Time:					
Penalty Deduct five (5) points for failure to follow guidelines.					
Dress Code Penalty Deduct five (5) points when dress code is not followed.					
Total Points					/100 max.
Report Score					/200 max.
Final Score (add total points and report score)					/300 max.

Name(s): _____

School: _____ State: _____

Judge's Signature: _____ Date: _____

Judge's Comments: