***Required documents checklist***

* Business registration paperwork
* Receipt of Filing
* Certificate of Incorporation or Articles of Organization
* Operating Agreement
* Publication of the LLC Receipts
* Tax EIN Official Letter
* Sales Tax Authority Certificate
* Emergency Contact Form (form attached)
* Product Comparison Chart (form attached)
* Pricing Sheet (form attached)
* Road Map Questions (form attached)

***Additional Required Documents for Some Food Products***

* Food Handler’s Certificate (for all food and kitchen using clients)
* **Scheduled Process (for jarred/bottled/products with liquid)**
* **Acidified Course (for products with acidity, online course)**
* **HACCP (only for businesses required to have one, i.e. freshly squeezed juices, fermented products, some items with seafood will also require a plan)**
* **Labels for packaged products (sample labels, do not print labels until approved by licensing agency, may be sent to us prior to the application)**

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Legal Name of Business \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Trade Name (DBA) (if any) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Owner(s)’ Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Current Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-mail \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Website \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Social media sites \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Additional Email/Contact Details \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ROADMAP QUESTIONS**

**All answers are to be typed and presented in the style of a business plan   
answering each of the topics and sub-questions**

1. **Concept of your business**be specific describe brand in 1-2 sentences maximum.   
   Your concept should answer the following questions in a clear and concise manner
   1. *What makes your brand/product unique*
   2. *what your company does*
   3. *how it’s done*
   4. *why you make it or do what you do*
   5. *why you, why are you authentic*
2. **Exactly what are you making and how do you package it**  
   Please answer the following questions, be specific as this effects your licensing
   1. *Name the item(s) you are manufacturing*
   2. *identify what the main ingredient(s) is*
   3. *explain the packaging it will be in when the customer receives your product.  
      please state the type of vessel and sealing method(s)*
3. **Product testing**Answer and list
   1. *who has sampled your product?   
      List them (friends, family, potential wholesale buyers)*
   2. *How many potential customers do you think you will have?   
      List them*
   3. *List who you believe will be your 1st customers*
4. **Product Interest**Answer and list, be specific with your answers
   1. *What kind of interest have you had from retail stores or other sales outlets?   
      Name the Outlets (neighborhood specialty stores, restaurants)*
   2. *Those who have sampled your product are they willing to pay your asking price?   
      List the F&F and what price they would pay for your product(s)  
      (What is the feedback on pricing from Friends & Family will they pay what you ask?)*
5. **Describe how you will promote/sell your product**   
   Using the comparison chart as research what makes you different than others.   
   List and answer specifically the tools being used
   1. *List all the opportunities you will use*
   2. *Describe the promotional tools in detail*
      1. *Name: On-line partners, on-line advertising, 3rd parties, website,*
      2. *Name: market participation*
      3. *return customer rewards, describe the program*
      4. *Name: gourmet stores, restaurants*
6. **How will you distribute your product?**Please answer in detail, this is a licensing requirement
   1. *Describe the various ways you will get your product to your customer?*
   2. *How will you deliver your product.*
7. **Marketing Strategies**Be specific and list the sales outlets
   1. *Where do you plan to begin your sales outreach?* 
      1. *Name the on-line outlets*
      2. *Name the wholesale accounts targeted*
      3. *Name the Markets and direct to consumer outlets*
      4. *Name the friends and family that will continue to purchase from you*
   2. *Why have you chosen these outlets?* 
      1. *Be specific.*
8. **Projections & Outreach Goals**give us realistic projections of sales broken down by month to month;   
   breakdown your week by the amount of hours being spent on marketing,   
   including new customer outreach (cold calls, store visits, etc)
   1. *Weekly plan, we are looking for your weekly time management*
      * 1. *number of cold calls, which days of the week (time spent)*
        2. *number of onsite visits, which days of the week (time spent)*
        3. *e-blast schedule (time spent)*
        4. *follow up emails to potential businesses (time spent)*
        5. *which days are market days (time spent)*
        6. *which days are for manufacturing*
   2. *Month 1: projection of sales, looking for $ \_\_\_\_\_.\_\_*
   3. *Month 1-3: projection of sales, looking for $ \_\_\_\_\_.\_\_*
   4. *Month 3-6: projection of sales, looking for $ \_\_\_\_\_.\_\_*
   5. *Month 6- 12: projection of sales, looking for $ \_\_\_\_\_.\_\_*
9. **Website/Brochure** 
   1. *List your website: http://\_\_\_\_\_\_\_\_.com  
      you at least need a homepage with your logo, brand mission, menu & contact*
10. **Summary of owners/management team**
    1. *List**Company titles/partners:* 
       1. *Their training; experience and skills*
11. **Number of Employees**
    1. *Do you have any Employees?*
       1. *What are their functions, culinary, sales, website/social media?*
       2. *What skills do they currently possess?*
    2. *If you plan to hire, what experience are you looking for?   
       Culinary, Marketing, Sales, Social Media, Public relations*
       1. *If you hire immediately, what skills are you looking for?*
12. **Expenses**
    1. *A list of what you think your start expenses will be and how you will fund this.  
       some are 1 time and others are monthly*
       1. *Ingredients*
       2. *Packaging costs, including labels*
       3. *Marketing costs, logo design, website set up, social media*
       4. *Email hosting*
       5. *Phone*
       6. *Car*
       7. *Equipment (knives, trays etc)*
       8. *Legal*
       9. *Accounting*
       10. *Storage*
       11. *And additional cost (OTHER)*