Capturing attention

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First cuts

- A “winnowing set”
- Is the idea a good one (interesting, a little different, sensible, solid)?
- What is your market (size and %)
- How capable is the management?
- Are the financials realistic?
The liability of newness

- Is especially problematic before there even is a firm
- The fundamental question is,

Can this management team rise above its collective inexperience to execute successfully it very good idea?
Win by not losing

• Eliminate all mistakes

• Where data are concerned, use the estimates of others, when available

• The body should be less than 35 pages (not including appendices)

• Five years of financials, monthly in Year 1, then quarterly
Elements of style

- Straightforward tone, no 50¢ words
- Clear, crisp, professional
- Enthusiastic, but not effusive
- Use the correct business jargon
- Mention specific numbers where you have them
Visuals

• The presentation should be more visual than the plan

• Use charts where appropriate, but keep them simple

• Market segmentation, unit sales, and organizational charts are often visual

• Include digital photos if relevant, but NO CLIP ART!

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