P3.S4.T4 Checklist for an initial business environment assessment[[1]](#footnote-1)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. The Business | | | | | | | | | | | | | |
| Name of entrepreneur: | | | | | | | | | | | | | |
| Description of the business: | | | | | | | | | | | | | |
| 2. Main competitors  *List your competitors and provide a detailed description of the good(s) or service(s) they sell.* | | | | | | | | | | | | | |
| Name of competitor’s business | | | Location and address | | | | | Good(s) or service(s) offered | | | | | |
| Competitor 1 | | |  | | | | |  | | | | | |
| Competitor 2 | | |  | | | | |  | | | | | |
| … | | |  | | | | |  | | | | | |
| Competitor n…. | | |  | | | | |  | | | | | |
| 3. Benchmarking main competitors | | | | | | | | | | | | | |
|  | YOUR BUSINESS NAME | | | | | NAME COMPETITOR 1 | | | | NAME COMPETITOR 2 | | | NAME COMPETITOR … |
| Price | Product/Service 1: \_\_\_\_ $  Product/Service 2: \_\_\_\_ $  …  Product/Service n: \_\_\_\_ $ | | | | | Product/Service 1: \_\_\_\_ $  Product/Service 2: \_\_\_\_ $  …  Product/Service n: \_\_\_\_ $ | | | | Product/Service 1: \_\_\_\_ $  Product/Service 2: \_\_\_\_ $  …  Product/Service n: \_\_\_\_ $ | | | Product/Service 1: \_\_\_\_ $  Product/Service 2: \_\_\_\_ $  …  Product/Service n: \_\_\_\_ $ |
| Quality | 🞏High 🞏Medium 🞏Low | | | | | 🞏High 🞏Medium 🞏Low | | | | 🞏High 🞏Medium 🞏Low | | | 🞏High 🞏Medium 🞏Low |
| Service  *(i.e. On-site, Delivery, Take-away, Home-service, …)* |  | | | | |  | | | |  | | |  |
| Experience  *Time offering such good(s) or service(s)* |  | | | | |  | | | |  | | |  |
| Location  *In relation to the point of sale (e.g. 2 minutes walk from the market, at the market, etc.)* |  | | | | |  | | | |  | | |  |
| Payment method  (mark all that apply) | 🞏 Cash  🞏 Mobile money  🞏 Credit/debit card  🞏 Bank transfer  🞏 Other (specify:\_\_\_\_\_\_\_) | | | | | 🞏 Cash  🞏 Mobile money  🞏 Credit/debit card  🞏 Bank transfer  🞏 Other (specify:\_\_\_\_\_\_\_\_) | | | | 🞏 Cash  🞏 Mobile money  🞏 Credit/debit card  🞏 Bank transfer  🞏 Other (specify:\_\_\_\_\_\_) | | | 🞏 Cash  🞏 Mobile money  🞏 Credit/debit card  🞏 Bank transfer  🞏 Other (specify:\_\_\_\_\_) |
| Advertising  *(I.e. Flyers, posters, social media, special offers, door-to-door, …)* |  | | | | |  | | | |  | | |  |
| Estimated number of clients per day |  | | | | |  | | | |  | | |  |
| Estimated expense per client |  | | | | |  | | | |  | | |  |
| Observations |  | | | | |  | | | |  | | |  |
| 4.Customers  *Describe the specific market segments and how the business will bring the products to the customers in each of these segments Try to estimate how much you could sell during a certain time. If you can, try to estimate the number of customers a typical business like yours can expect. Are there seasonal changes in demand?* | | | | | | | | | | | | | |
|  | Description | | | | | Type of service preferred  *(i.e. On-site, Delivery, Take-away, Home* | | | Motivation for your business  *(i.e. price, quality, location, environment, access, …. )* | | | Comments | |
| <Customer segment 1> |  | | | | |  | | |  | | |  | |
| <Customer segment 2> |  | | | | |  | | |  | | |  | |
| <Customer segment 3> |  | | | | |  | | |  | | |  | |
| 5. Sales estimates  *Estimate how much you can sell during a certain period of time. Consider seasonal or weekday changes in demand.* | | | | | | | | | | | | | |
| **Product/service** | | **Period of time/Sales by type of service** | | | | | | | | | **Other considerations** | | |
| ***Example***  *Daily special* | | |  |  | | --- | --- | | *Daily Monday to Friday* | *In-site: \_\_\_\_\_\_\_ Meals*  *Delivery: \_\_\_\_\_\_\_Meals* | | *Saturday (market day)* | *In-site:\_\_\_\_\_\_\_\_\_Meals* | | *Sunday (market closure)* | *Delivery: \_\_\_\_\_\_ meals* | | | | | | | | | | * *In the month of Ramadhan, sales of daily special meals are reduced by xx%.* * *Monday – Friday Daily special’s price is xx% higher/less* | | |
| Product/service 1 | |  | | | | | | | | |  | | |
| Product/service 2 | |  | | | | | | | | |  | | |
| … | |  | | | | | | | | |  | | |
| Product/service n | |  | | | | | | | | |  | | |
| 6. Suppliers of equipment, material, utilities and infrastructure  *Describe the suppliers of all the major inputs needed to operate the business, describe the quality of their products, note the prices of their products, and rate their reliability.* | | | | | | | | | | | | | |
| **Name & contact information**  *(Name, phone number 1, alternative phone number, e-mail, location,…)* | | | | | **Product(s)/Service(s)** | | **Description of quality, price, and reliability** | | | | | | |
|  | | | |  | | |  | | | | | | |
|  | | | |  | | |  | | | | | | |
|  | | | |  | | |  | | | | | | |
|  | | | |  | | |  | | | | | | |
| 7. Rules and regulations  *Describe the rules and regulations that govern market access and note eventual respective costs (e.g. fees, licenses, taxes).* | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| 8. Other observations | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |

1. Adapted from ICRC, BUSINESS SKILLS TRAINING COURSE FOR BENEFICIARIES OF MICROECONOMIC INITIATIVES, October 2014 [↑](#footnote-ref-1)