

EMERGING LEGACY CLIENT



1- GRAS ONBOARDING PROCESS

➤ STEP 1: SIGN Engagement Letter.

Once you have read GRAS engagement letter your business advisor will setup a time to discuss the business maximization process, typical third-party cost, and potential funding options.

➤ STEP 2: APPLICATION DEVELOPMENT

The GRAS Questionnaire will help you fast track the business plan process and explore funding options more efficiently. Simply go to www.grasbiz.com and click the business client onboarding button on the home page.

➤ STEP 3: Business Plan Creation

A call will be setup between your business advisor and a certified business plan writer (MBA) who will either update your existing business plan or create a new one so it can be submitted for funding and/or provide the roadmap to begin executing your business goals more efficiently.

➤ Step 4. Submit for funding and/or begin executing business plan

You will begin meeting with funders and/or third parties that can assist in helping you reach your business goals.

2- BUSINESS PLAN PROCESS

WEEK 1:

- Questionnaire, Discovery Call & Business Model
- Conduct Market & Industry Research

WEEK 2:

- Financial Modeling & Required Capital Analysis
 - Five Year Proforma: Revenue Forecast
 - Operating Expenditures
 - Personnel Forecast
 - Use of Funds
 - Income Statement
 - Balance Sheet
- Business Plan Development
 - 25-35 Pages
 - Company Analysis
 - Industry Analysis
 - Market & Opportunity
 - Marketing Plan
 - Management Team
 - Financial Plan

WEEK 3/4:

- Business Plan Revision
 - Client/Bplan Writer Review Session
 - Graphic Design
 - Upload Bank Required Financial/Tax Documents to GRAS Client Portal
 - Prepare To Submit to Funder

ADDITIONAL RECOMMENDED SOLUTIONS

STEP 1. PLAN

- Business Planning
- Business Formation
- TAX ID Number
- Business License

STEP 2: BUILD

- Business Branding
- Implement Client Acquisition Strategies
- Business Website & App
- Digital Marketing

STEP 3: FUND

- Business Bank Account
- Building Business Credit
- Business Loan Review
- Venture Capital Review
- Business Credit Cards

STEP 4: Operations

- Sign up for Monthly/Quarterly Advisor Meeting to Review Business Plan With Business Advisor
- Discuss Building An Advisory Board.

