

Center for Educational Leadership

Entrepreneurship and Financial Literacy Training An Entrepreneurship Course

Associate Trainee _____
 Date of Assessment: _____
 Entrepreneurship Coach: _____

NEEDS ASSESSMENT AUDIT

Needs Assessment Worksheet	
Organizational Requirement	Organizational Outcomes
Bus. Form: Corp/Sole	
Business Name (DBA)	
Reserve Corp. Name	
Articles of Incorp.	
Patent Application	
Federal Trademarks	
Bus. Lic./Permits	
Business Phone	
Business Cards	
Business Bank Acct	
Business Insurance	
Sales Tax Number	
Fed. Employ. Tax ID	
Bus. Cards	
Brochure	
Web Site	
Office/warehouse	
Storage facility	
P.O. Box	
Competitive Requirements	Competitive Analysis Outcomes
Market Need	
Market Solution	
Competition	
Target Market	
Demographic	
Market Niche	
Geographic	
Lifestyle/Hobby/Rec	
Consumer/ Business	

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Product Development			
Products Offered			
Prototype			
Patent/ Trademark			
Product Packaging			
Services Offered			
Warranty			
Materials/Inventory			
Product Pricing			
Product Cost			
Profit Margin			
Price Points			
Customization			
Discounts			
Bulk Sales			
Retail Pricing			
Wholesale Pricing			
Suppliers			
Local			
Global			
Virtual			
Drop-Ship			
Consignment			
Marketing Model			
Advertising			
Personal Selling			
Direct Sales			
Sales Promotion			
Revenue Model			
Sales type	Comments	Sales Type	Comments
Product Sales		Seminars/Training	
Technical Support		Video Training	
Hard bound text		How-to-Guides	
Affiliate Revenue		Referrals	
Commissions		Donations/Grants	
Operations Model			
Organizational Chart			
Office/Internet			
In-house sales			
Telemarketing			
Mail order			
Payment Structure			
Cash/Credit		Membership	
Commission		Online Processing	

