# ATB Business Plan Template

**Instructions:**

**How to use this template:**

Creating a comprehensive business plan is a crucial step in launching or growing a successful business, especially when it comes to funding. This template provides a structured framework to help you outline your business concept, objectives, strategies, plans and financial projections.

Every section of this business plan has suggested content and framework to help you build your first business plan. Please note that every section may not be relevant to your business, so leverage them based on what works best for you.

**Consider your business plan a living document.**

Your business plan is not a static document. You should continually refer back to it as your business and the market evolves. By having this outline in place, you have a constant source to inform you of the key elements in your business plan.

To dive deeper into business planning, we recommend you check out the [ATB Entrepreneur Centre](https://atbentrepreneurcentre.com/) website for resources, educational events, and more.

| Once your business plan is complete and your business is ready for funding, you can [book an appointment with an ATB Business Advisor](https://meet.atb.com/) to discuss your unique business’ financial and strategic needs.  |
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Your Business’ Name

# Business Plan



Date

Founder Name(s)

Phone Number

Email Address

Website

Business Address

# Table of Contents

1. [**Executive Summary**](#_cfqyoxr2394h)
	1. Company Profile Summary
	2. Marketing Plan Summary
	3. Operating Plan Summary
	4. Management Team Summary
	5. Financial Planning Summary
2. [**Company Profile**](#_1ewgfck8wyoq)
	1. Company Details
	2. Mission Statement
	3. Vision Statement
	4. Company History
3. [**Products and Services**](#_ltf28ihvjwrk)
4. [**Market Research**](#_wtjc0ti6goze)
	1. General Market Analysis
	2. Market Sizing & Segmentation
	3. Target Market & Customer Profile
	4. Competitor Analysis
	5. SWOT Analysis
5. [**Marketing Plan**](#_2a4a8a9qkmwb)
	1. Marketing Strategy
	2. Products and Services
	3. Pricing Strategy
6. [**Operating Plan**](#_6qjdi3677k92)
	1. Locations and Facilities
	2. Major Equipment and Materials
	3. Suppliers
	4. Key Business Processes
7. [**Leadership Team**](#_d3oiltv67pob)
	1. Leadership and Management Team
	2. Operational Team
	3. Additional Advisors
8. [**Financial Planning**](#_lvnhh8vkzkf0)
	1. Start Up Costs
	2. Financial Projections
	3. Sensitivity Analysis of Financial Projections
	4. Current Assets and Liabilities
	5. Break-even Analysis
	6. Funding Request
9. [**Appendices**](#_77irsgqgpqib)

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# Executive summary

*This is a key summary of your business plan and provides a first look into your business. Your executive summary has all the key information needed to understand the basics of your business.*

**Company Profile Summary**

*Provide a brief summary of your company profile.*

**Marketing Plan Summary**

*Provide a summary of your marketing plan.*

**Operating Plan Summary**

*Provide a summary of your operating plan.*

**Leadership Team Summary**

*Provide an overview of your leadership team and key personnel.*

**Financial Planning Summary**

*Provide a summary of your financial planning.*

***Tip:*** *Your executive summary should be written once you’ve completed your business plan. It should effectively summarize everything held within your business plan.*

# Company profile

*The company profile describes the company history, location, team, legal structure, and long term vision.*

**Company Details**

*Your business name, description, date established, legal structure, location, owners and/or shareholders.*

**Mission Statement**

*The purpose of the business, why your company exists, your business’ core values.*

**Vision Statement**

*What is the long term vision for the company, what are your audacious goals, this is a place where you can be bold in your thinking.*

**Company History**

*What has been accomplished so far, when the business was created, information on the founders and key advisors.*

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# **Products and Services**

*Describe the products and/or services that your business offers, how the product/service benefits your customers, and how the products/services will be offered.*

# Market Research

*This will be a detailed analysis of the industry and market trends.*

**General Market Analysis**

*This should be informed by both direct and indirect market research. This outlines the opportunity you have found and goes into detail.*

**Market Sizing & Segmentation**

*Describe the market in terms of size using different statistics and clear assumptions. Describe the unique subsets of the market and how they can be distinguished.*

**Target Market & Customer Profile**

*What area your business is focusing on? This section should go into immense detail on your target market customer characteristics.*

**Competitor Analysis**

*Focus on outlining direct and indirect competitors showcasing substitute products and services your potential customers may spend money on, analyze their strengths and weaknesses.*

**SWOT Analysis**

*Identify the strengths, weaknesses, opportunities and threats that may impact your business. The SWOT analysis should inform your marketing plan, operation and management and financial planning.*

# Marketing Plan

*The marketing plan outlines your strategy to target and engage key customer segments, build brand awareness, and achieve our sales and growth objectives.*

**Marketing Strategy**

*Outbound vs inbound marketing, building credibility, advertising and promotional plan. How will you convince people to switch to your business?*

**Products and Services**

*Describe in detail the core products and services of your offering and the unique benefits they deliver. How are they different from what already exists in the market and how are they contributing to your revenue?*

**Pricing Strategy**

*Explain how you will price your products and services and how this will fit with your target customer’s willingness to pay and support your business financially. Be sure to include reasonable cost assumptions.*

# Operational Plan

*Your business’ activities and the processes you’ve created to ensure run-of-business and help deliver your products and services to your customers.*

**Locations and Facilities** - *Where is your business going to operate and what requirements or challenges need to be addressed? Clearly explain your location.*

**Major Equipment and Materials**

*Describe any equipment or material needs for your space.*

**Suppliers**

*Give details on key suppliers that support your business as well as an inventory plan. Consider including potential alternative suppliers. Ensure there is a clear understanding of the supply chain process to support your inventory.*

**Key Business Processes**

*Describe your payment process, what guarantees, warranties, and inventory models you will be offering, your process for customer relationship management, payroll process/or providers, plus the key software required to enable activities.*

# Leadership Team

*Create a profile for your key team members and their responsibilities and roles. Include professional advisors and stakeholders.*

**Leadership and Management Team**

*Include the people on your leadership team, including name, title, how long they have been with the business, role description and their responsibilities.*

**Operational Team**

*Include any non-leadership employees who are responsible for the operations of your business (name and title).*

**Additional Advisors**

*Who are the advisors external to your business that you work with to build and grow your business? For example, your business banking advisor, accountant, lawyer, bookkeeper and other key people.*

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# Financial Planning

*The financial planning section provides a comprehensive overview of your business’ projected revenues, expenses, and cash flow, enabling you (and lenders) to make informed and strategic financial decisions.*

**Start Up Costs (Overhead)**

*Outline the costs required to start your business operations. Use clear assumptions and industry standards to help you with ambiguity.*

**Financial Projections (Cash Flow - Two Years/24 Months)**

*When creating financial projections, it's important to outline how you came up with each figure in order to make sense of the numbers. Your lender needs to understand whether or not your financial projections are achievable, and how you plan to achieve them. Be sure to showcase an understanding of the costs associated with operating your organization.*

**Sensitivity Analysis of Financial Projections**

*Calculate your financial projections for your business. You should include three different scenarios: 100% revenue, 75% revenue and 50% revenue. Is your business still profitable in all three scenarios?*

**Current Assets and Liabilities**

*Include a list of any current liabilities and assets that your company is holding.*

**Break-even Analysis**

*Break-even is where your sales revenue matches overhead and production costs.*

**Funding Request**

*Include the amount of funding needed, the purpose of the funding and how it will be used.This will be supported by all the previous financial planning and will give a clear summary of how much funding your business needs.*

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# Appendices

*Common appendices include resumes, personal or business financials, contracts, licenses & permits, marketing materials, and any other materials that could help add context to your business plan.*