

# Business Plan

A clear plan built on good research is fundamental to the success of every enterprise, no matter the size. A solid business plan is also a tremendous help in discussions with financial backers of all kinds.

# Using the ATB Business Plan

This plan should be used with [ATB Business Plan Guide](#). As you work through the guide, write your plan in this document to save for future reference.

## Here are a few general principles to guide you:

- Fill in the executive summary last.
- Include the date on all the information you provide. Readers will want to know how current your plan is.
- Add appendices as necessary.
- Try to keep the plan between 15 and 20 pages in length. Depending on what kind of business you operate, some sections may be longer than others.

If you have questions or need assistance, ATB's entrepreneur strategists are here to help. [Contact us today to book an appointment.](#)

## Executive Summary

Company name: \_\_\_\_\_

Contact person: \_\_\_\_\_

Address: \_\_\_\_\_

Website: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Date business plan completed: \_\_\_\_\_

Legal structure:    Sole proprietor    Partnership    Corporation    Non-profit Other

Owners: \_\_\_\_\_

Business description:

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Key personnel (owners, managers, etc):

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SWOT summary:

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**Go-to-market summary:**

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**Projected first year sales, gross margin and net profit:**

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**Financing sources to date (including planned and personal):**

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**Financing needs (list all funds needed to launch or reposition your business):**

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# Products and services

Primary product or service offerings:

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Pricing strategy:

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Your competitive advantage:

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Barriers to entry for more competition:

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**SWOT analysis**

**Strengths:**

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**Weaknesses:**

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**Opportunities:**

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**Threats:**

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**Marketing plan:**

To create a more indepth marketing plan download the [ATB Marketing Plan Template](#)

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**Sales:**

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**Business operations**

**Location/facilities:**

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**Suppliers:**

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# Financial plan and statements

**Assumptions:**

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**Cash flow forecast:**

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**Sales projections:**

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**Income statement:**

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**Financial needs**

How financing will be used:

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Identify current loans and investments:

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Your personal assets and liabilities:

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Identify any security you can offer:

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