

ATB

Business Plan Template

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Using the ATB Business Plan Template

This template should be used with **ATB Business Plan Builder**. As you work through the Builder, 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. Head [here](#) 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:

Key personnel (owners, managers, etc):

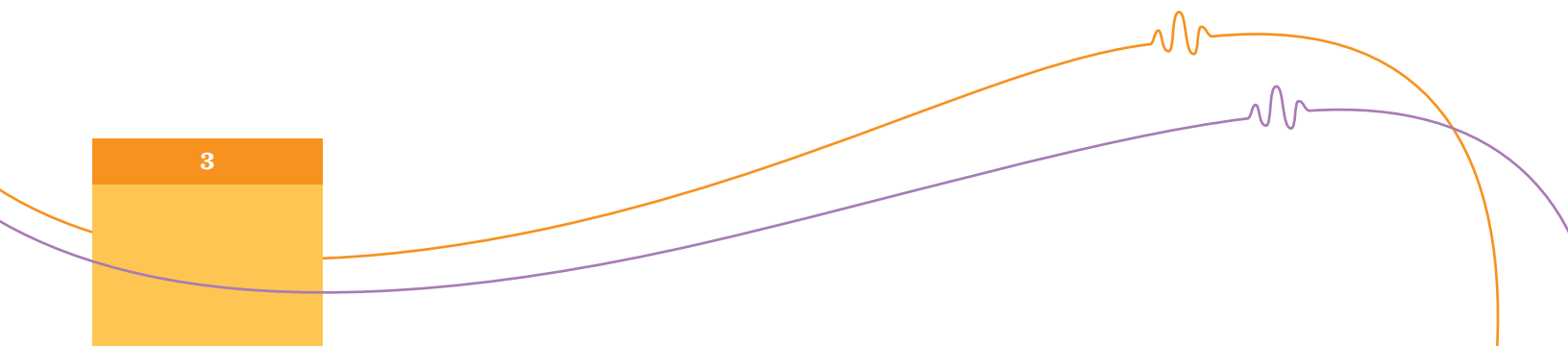
SWOT summary:

Go-to-market summary:

Projected first year sales, gross margin and net profit:

Financing sources to date (including planned and personal):

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



Vision and mission

Your business mission:

Your business vision for the next three years:



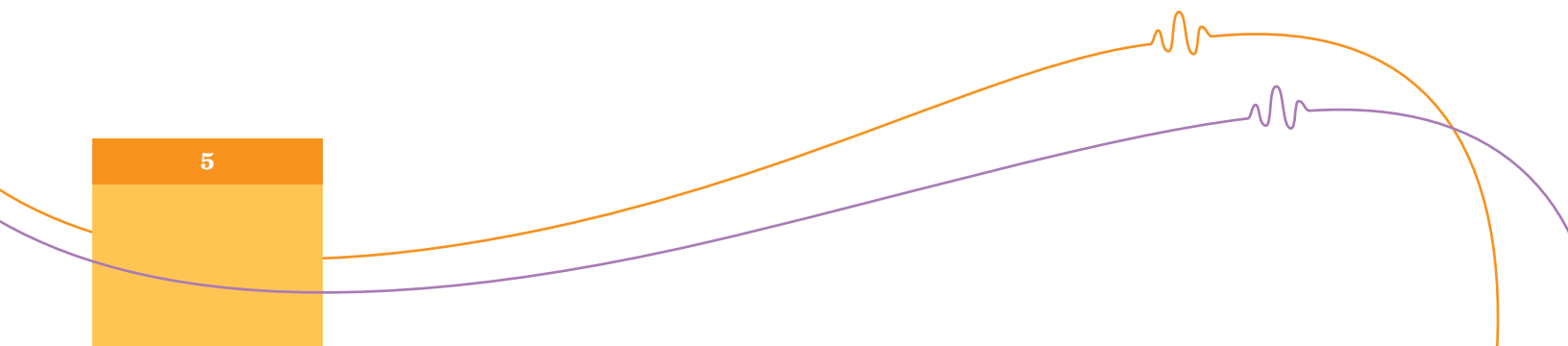
Products and services

Primary product or service offerings:

Pricing strategy:

Your competitive advantage:

Barriers to entry for more competition:

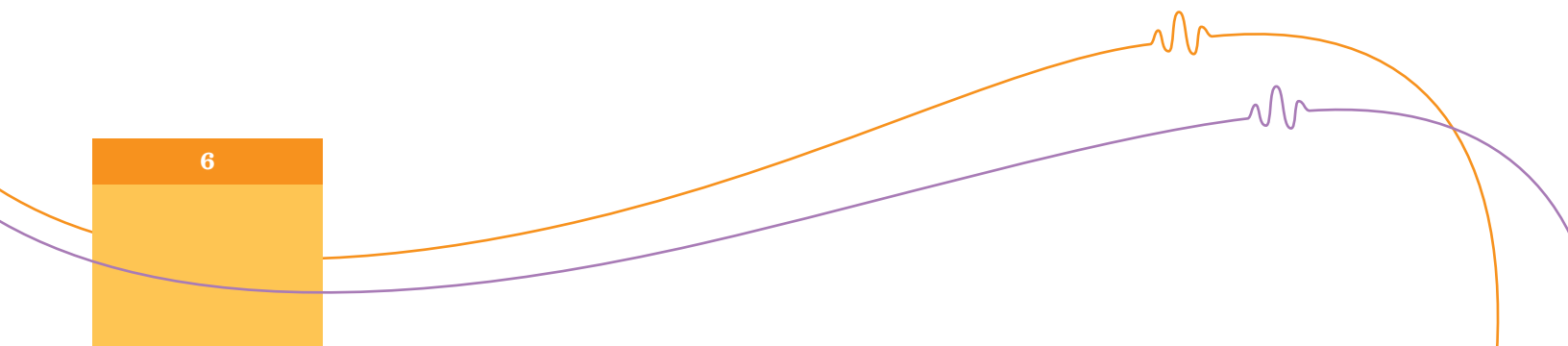


Production/delivery process:

Guarantee policies:

Marketing and sales

Define your primary and secondary target markets:



SWOT analysis

Strengths:

Weaknesses:

Opportunities:

Threats:



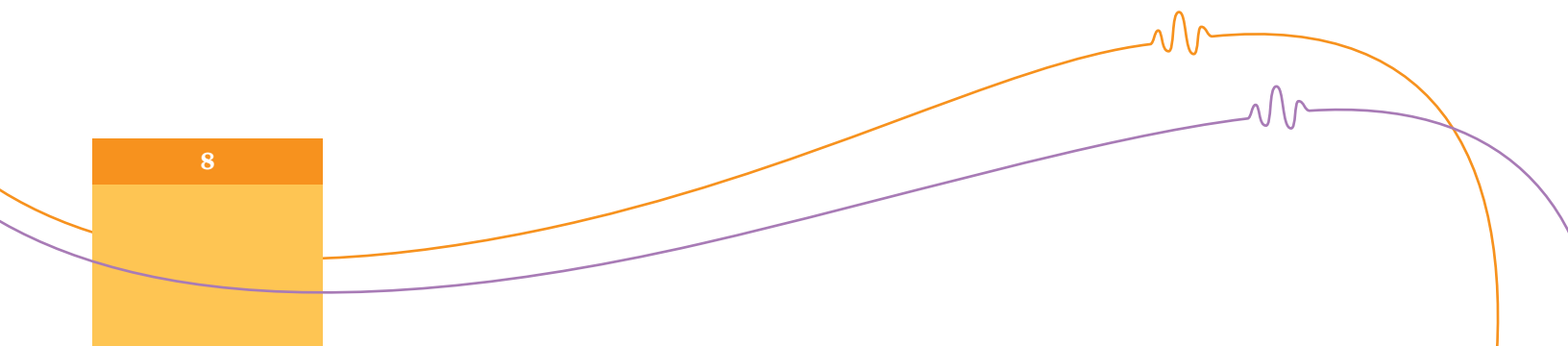
Marketing plan:

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

Sales:

Business operations

Location/facilities:

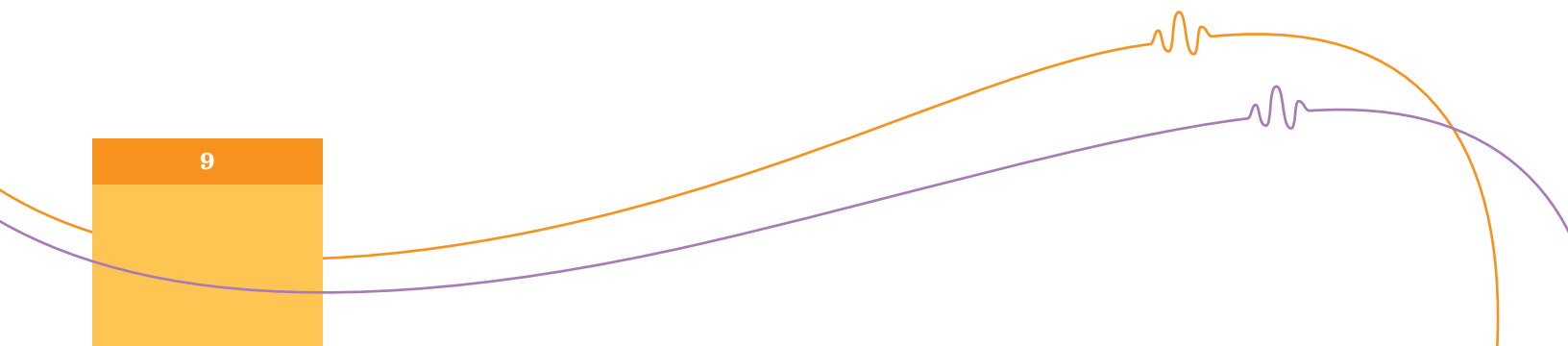


Suppliers:

Management team, employees and advisors

Management team:

Employees:

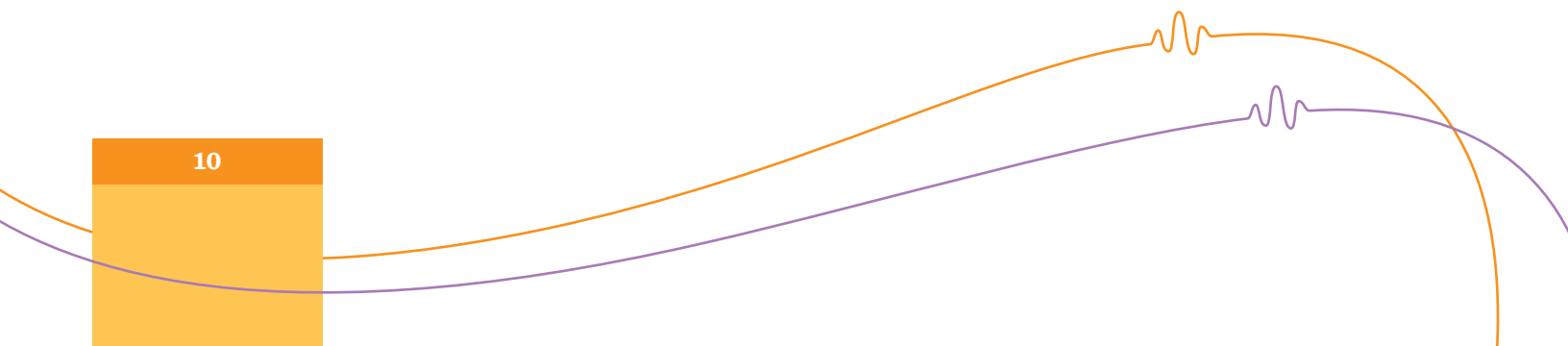


Advisors:

Financial plan and statements

Assumptions:

Cash flow forecast:

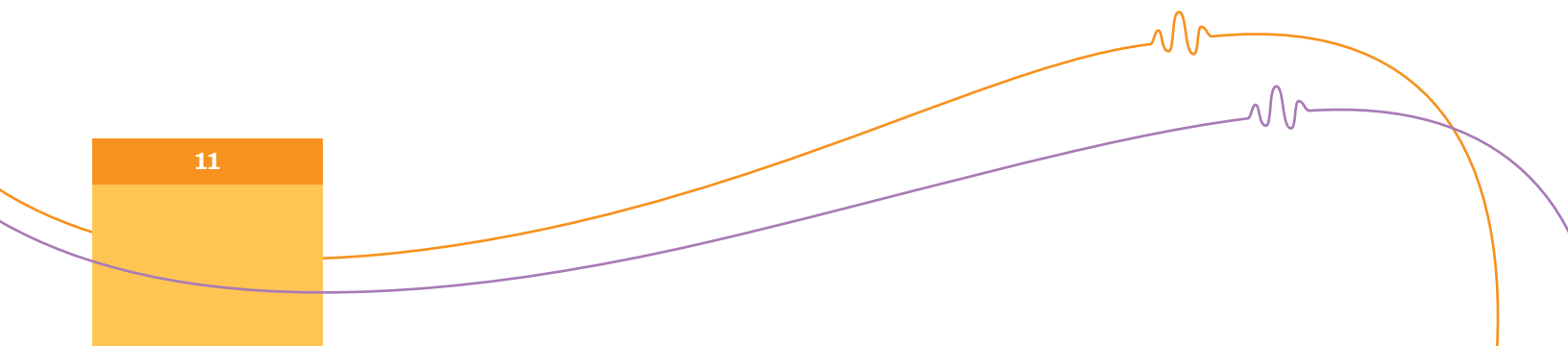


Sales projections:

Income statement:

Financial needs

How financing will be used:



Identify current loans and investments:

Your personal assets and liabilities:

Identify any security you can offer:

