|  |
| --- |
| Business Name |

Prepared by:

Company Address:

Phone number:

Email Address:

Social Media Links:

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# EXECUTIVE SUMMARY

Write this section last

## Description of the Business

Describe the business overall; what is it you are proposing?

How is this business structured/Legal ownership breakdown

## Brief overview of Management Team / Owner(s)

## Goals & Objectives

what do you want to accomplish in 1-3 years)

## Vision Statement

where do you see your business in the Future

## Mission Statement

The “Why” of what you are doing

**Financial Considerations**

Estimate total amount of start-up. Are you seeking a loan? If so, for how much and who are you planning to approach?

## Keys to Success

List what you feel makes you successful or your business perceived as successful

# PRODUCTS AND SERVICES

## Initial Products and Services

List or describe your products and/or services you are offering. Also include anything that makes you unique.

**Features and Benefits**

List any features or benefits of your products/services – make a table if you like

**Future Products and Services**

List any future product and services you hope to have and when you hope to implement them – give a timeline.

# SWOT (STRENGTHS AND WEAKNESSES)

After assessing the strengths and weaknesses within [NAME OF COMPANY HERE], there are a number of key factors determined. [NAME OF COMPANY HERE] and the owner [NAME OF PERSON HERE] bring a number of strengths and weaknesses to this business. Included below also addresses external opportunities and threats that may affect the business.

|  |  |
| --- | --- |
| STRENGTHS | WEAKNESSES |
| TYPE HERE  | TYPE HERE |

|  |  |
| --- | --- |
| OPPORTUNITIES | THREATS |
| TYPE HERE | TYPE HERE |

## Overcoming Obstacles and Weaknesses

List how you plan to overcome the weaknesses and threats you list above. This is your plan to either prevent them or how you plan to tackle these issues.

# MARKET ANALYSIS

General Overview: Who is going to buy your products/services? Describe them.

Who do you see as your ideal customer? And Why?

Ideal customer:

## Total Market Size

What geographical area are you reaching

What is the population numbers and area you are reaching?

What percentage of the market do you think you can reach?

## Target Market

Next, get specific about your different types of customers; break them down by describing your Target Market (This includes your Primary, Secondary and Tertiary markets).

Are you targeting consumers or commercial? Who is (are) your end user(s) of your products and services?

Use the chart below to help break down your characteristics.

 [company name here], has identified [three] potential client or customer types.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Target Market | Gender, age range, &/or general description |  What are their needs? | How often will they purchase? | Income levels or other |
| Primary  |  |  |  |  |
| Secondary  |  |  |  |  |
| Tertiary  |  |  |  |  |

Use this space to expand on your customer/client traits/needs:

## Market Share

What reasonable percent of the market are you able to obtain? If 9000 people fit your target market range – how many will you serve? What is reasonable? Can you guestimate how many clients your competitors have?

## Competition

Identify the total number of competitors in your region you can find.

Who are your competitors? (do a google search, kijiji search, FB search, yellowpages search)

If you don’t have any direct competitors, describe other key industries or business that you are competing against for the same dollar.

If possible, identify your top 1-3 competitors. List them below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Competitor** | **Strengths** | **Weaknesses** | **Years in Business** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |

How do you relate / compare / differ to your top competitors (hours, product/services, prices, policies, customer service, availability, etc?

# MARKETING PLAN

## Marketing Overview

Brief statement or two describing the broad picture of how your business will be perceived and where you fit into the market and the community.

## Marketing Objectives

Set one to four very specific, identifiable and realistic marketing goals. What do you hope to do with your marketing? Who do you want to reach, with what method? Eg) deliver 2000 door knockers brochures to Desert Blume, Southridge and RossGlen.

## Strategy and Promotional Plan

Describe your business image and brand; (location, staff, layout, stationary, service all reflect the image – what experience do you want your customer to have or feel?

Describe what you will do to attract your target audience. What messaging, wording, communication will you use to connect with your target market?

## Methods of Advertising

List the ways you intent to advertise, also how will you track the results of your advertising and promotion efforts? some examples are below (remove what doesn’t apply):

1. road signs – and locations
2. radio/TV – ads and commercials
3. newspaper – ads, articles, press releases
4. yellowpages (online)
5. social media – FB, Twitter, Instagram, Linked In…?
6. kijiji and other sales sites
7. special events (fashion shows, special sales events, guest appearances etc.)
8. demonstrations, exhibitions, trade shows – which ones?
9. Business events – which ones?
10. Coupons/brochures/door knocker ads/postcard mailings/flyers/posters - where?
11. Door to door contact / sales
12. Vehicle decaling / wrap
13. contests
14. free samples/ give-aways (.)
15. promotional items – hats, shirts, pens, calendars, magnets etc
16. special price offers and rebates – seasonal or holiday related?
17. prizes
18. sponsoring of charitable groups, teams, events, groups etc

## Marketing Budget

What is your marketing budget for all of your described methods above, monthly, annually etc.

## Pricing Structures

Describe your pricing strategy (hourly, packages, by product, by square foot, etc). How did you determine this?

Are you competitive (above, equal or below)?

How do you mark-up products, what offers or promotions do you plan to offer and how do you compare to your industry/competitors?

You may decide to insert a pricing guide or attach one to the appendix section.

## Terms of Payment

What methods of payment will you accept?

# OPERATIONS

## Location

What is the address/location and why you have chosen that location? (home, storefront, mobile)

Describe the space you need and any affiliated costs associated with your location.

Does it have enough parking? Is it accessible?

## Hours of Operation

In addition to listing the weekly/daily hours, remember to include your yearly vacation time or days closed etc. Explain why you chose those hours.

## Equipment and Inventory Listing

Create a list of the already owned and the yet to purchase (needed) equipment and the cost associate with each item.

Create a list of needed inventory and the cost associated it

## Supplies and Materials

List all the necessary supplies you need. Office supplies, décor, inventory etc

Who are your suppliers for major items – inventory. Where are they located? How soon can you receive product? Will your customer wait for something to be ordered?

## Manufacturing Process

Describe your process if you have one, otherwise delete whole section

## Estimated Open or Start-Up

When do you anticipate toopen for business? What obstacles are in your way currently?

##  Customer Service Policies

BE SPECIFIC!! How are you going to wow your customers? What makes you different? YOUR OVERALL PLAN FOR SERVICE DELIVERY, EMPLOYEE EMPOWERMENT, CUSTOMER RETENTION PLAN, REFERRALS, RETURN POLICY, CALL RETURN POLICY

# MANAGEMENT PLAN

Owner(s) title(s) and responsibilities and responsibilities of other legal structures (shareholders and directors etc if applicable).

Owner’s biography &/or experience. Include anticipated owners drawings (wages or salary)

## Staffing Requirements

How many staff do you need to start? Describe their titles, job descriptions and rate of pay and benefits for each employee. IF you don’t require employees, explain why or when you anticipate needing them).

## Business Advisors

List the contact information for the following business advisors you may have access to. Add any to this list that pertain to you that are not listed below OR remove “other” category if not using.

1. LAWYER/LEGAL
2. ACCOUNTANT/BOOKKEEPER
3. BANK/FINANCIAL INSTITUTION
4. PERSONAL OR PRIVATE LENDER(S)
5. BUSINESS ADVISORS

Community Futures Chinook

5324 – 48 Ave

Taber, AB T1G 1S2

403-223-2984

1. OTHER

# FINANCIAL PLAN

## Start-Up Expenses

There are a number of costs at start up, in order to open the doors of this business. See the table below for the anticipated or actual start-ups costs to be incurred or what you’ve already incurred:

|  |  |
| --- | --- |
| Business License Fee (initial) | $ |
| Sole or Corp Set Up Fees | $ |
| Deposits (rent/other) | $ |
| Additional Legal/Acc’t Costs | $ |
| Leasehold Modifications | $ |
| Equipment Needed | $ |
| Tools Needed | $ |
| Supplies Needed | $ |
| Initial Marketing Dollars | $ |
| Business Cards | $ |
| Opening Inventory | $ |
| Other: | $ |
| Total Startup Expenses | $ |

## Financial Documentation

[COMPANY NAME HERE], has projected sales and profits for the first three years to be: (taken from Cash Flow analysis statements).

|  |  |  |
| --- | --- | --- |
| **YEAR** | **TOTAL SALES** | **PROFITS** |
| YEAR 1 | $ | $ |
| YEAR 2 | $ | $ |

For a full breakdown**, please see attached 3-Year Cash Flow analysis, income statement, balance sheet** with projected sales and budget estimations at the end of this business plan.

## Financial Management

Who is doing the financial management (bookkeeping, taxes, filings etc)? Hiring it out, doing it yourself etc)

## Year End

When is your year end for your business? When are your taxes (business and/or gst) due?

## Capital Contribution

Owners Investment: How much, are you as the owner contributing to your business start-up? Break it down by: Cash (credit lines), RRSP’s, personal assets, tools/equipment.

Outsourced Capital: Additionally include any outside loans from friends and relatives or other financial contributors.

## Milestones

Long Term dreams, purchases or expansion ideas as examples.

# Appendix Documents

List any sources you used to back up statements made in your plan. You may include things such as: personal financial statements, copy of a lease, letters of reference, contracts for jobs, photographs, marketing materials etc.