# A logo with a leaf Description automatically generated

# Business Plan Template

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| Instructions  1. First and foremost, a business plan is to help you, the entrepreneur. Spending time on this plan is a great investment in your business. 2. Personalize your business plan, using this template only as a guide. There may be sections that are not relevant to you. 3. Remember that a business plan is not a static document. Update it regularly to reflect changes in your business, market conditions, and financial performance. 4. Be realistic in your projections and claims. Overly optimistic plans may lead to disappointment if you can't deliver on them. 5. Your business plan should be a professionally presented, simply written document. Use plain language and be sure to edit for spelling and grammar. |

Hold for Table of Contents

Company Name

Business plan

### Prepared

YYYY-MM-DD

### Contact Information

Name Last Name

(###) ###-####

[name@company.ca](mailto:name@company.ca)

company.ca

### Business Address

Address line

City, Province, ### ### CA



Section 1

Company Profile

#### What to include here:

* State your business name and products/services provided.
* What is your mission and vision?
* What is the legal status and ownership? Is it a sole proprietorship, partnership or corporation?
* When will/did it start operations?
* Who owns the business?
* Where is it located?
* Who is the management team, advisors, other key personnel?

Your text here…

## Products and services

#### What to include here:

What products or services are you currently selling?

What portion of overall revenues does each product or service represent?

* What are your main market channels? Which market channels do you want to develop and grow?

Your text here…

Section 2

Project Overview

#### What to include here:

Nature of your project

Opportunity you want to capture

What are the timelines and revenue targets for your project?

What is your goal and your target completion date?

* What risks would compromise your ability to complete the project? How will you mitigate these risks?
* What, if any, other resources will you require to complete the project? Eg. Staff, expertise, etc.

Your text here…

## Financing need

#### What to include here:

What is your current sales level?

How much money do you require for your project?

How much will you finance yourself?

How do you plan on investing the money?

Your text here…

## Key people

#### What to include here:

Who are the main executives/advisors in your business?

What experience do they bring to the role?

What are their current responsibilities within the company?

Your text here…

Section 3

Risk Assessment and Contingency Plan

#### What to include here:

What are your company’s weaknesses, (internal), or threats, (external), that could unhinge your business plans?

Are you facing a skilled shortage?

Is there a risk of a competitor taking over your customers?

Are there changes to laws or regulations that may affect your business?

How you will monitor, measure and respond to these risks?

Your text here…

Section 4

Industry Overview and Trends

#### What to include here:

What’s happening in your industry, or in the market where you’re selling, that could have a positive or negative impact on your company?

Have you seen changes in demand for a product or service?

Is your current product or service at risk of becoming obsolete, forcing you to change?

* Are there new technologies that could impact your business?

Have new competitors emerged?

Could new regulations, tax or trade laws have an impact on your business?

Your text here…

## The market

#### What to include here:

What is your target market in terms of age, gender, demographic, geographical location, etc.?

* What new market opportunities would you like to pursue?

Is your target market changing?

How has customer behaviour changed over time?

Are there new products or services that have emerged?

Has the supply chain changed?

Your text here…

## The competition

#### What to include here:

Who are your competitors?

What are your competitors’ strengths and vulnerabilities?

Are there companies disrupting or undermining your industry or selling a new product or service that may replace yours?

What would make customers choose your product or service over your competitors’ offerings?

Your text here…

Section 5

Sales and marketing

## Customers and Suppliers

#### What to include here:

* Who are your key customers and suppliers and how you communicate with them?
* How do you price and distribute your product or service?

Your text here…

## Advertising and promotion

#### What to include here:

* Do you have a marketing strategy? What does it include?

How you are reaching and selling to customers?

What technology and staff resources do you have in place to support your advertising?

Your text here…

## Pricing and distribution

#### What to include here:

How do you price services or products?

How do you deliver your product or service?

Is there anything external that could affect or alter your pricing or delivery?

Your text here…

Section 6

Operating plan

#### What to include here:

* What is/are your business location(s)?
* Are there any challenges or opportunities that result from this location?
* What equipment do you need to operate? Does it need to be upgraded regularly?
* What technologies are necessary for you to remain competitive?
* What labour or expertise do you require to operate? Are you facing any challenges accessing this?

What type of permits, monitoring and inspections do you require to ensure your business complies with environmental regulations?

Are there any new regulations or laws in place or impending that could impact your business?

Your text here…

Section 7

## Appendices

Include relevant attachments, which may include:

* Cash Flow Forecast
* CVs of key leaders
* Breakeven Analysis
* Strategic Plan
* Marketing Plan
* Etc…



Business Plan

### company.ca