

ATM Business Plan Template

Use this page to set the tone for your plan, but keep it simple.

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Executive Summary

The Executive Summary is a 1 page document that gives a quick overview of the business. Basically you will summarize each section of your business plan in a sentence or two here. The purpose of the Executive Summary is to give the reader a quick baseline. Each reader of your plan has a different interest in your company, so this page will give them a broad understanding so they can go on to their topic of interest.

Mission Statement:

Management Plan:

Operations Plan:

Industry and Target Market:

Marketing Plan:

Financial Statement:

Corporate Summary

Briefly summarize your business and mission. This should be no longer than 1 paragraph and give details like location, business, and some details that set you apart from the competition. Basically this is your 10 second elevator pitch in writing.

Management Plan

The Management Plan is your place to describe the organizational structure of the business. You will be describing the legal tax designation of your business, detailing your management structure, and providing your personal story.

Legal Form of Business

Explain your legal business and ownership structure here.

Management Team

Break down the members of ownership and any management structure you will have here. Give details about your team. This will give readers confidence that you have the experience necessary to succeed.

Investors/Advisory Board

Do you have any external guidance? Break that down in this section. This shows that you have others invested in your success and will again give confidence that the team you've built is a strong and successful one.

Operations Plan

The Operations Plan is a detailed report of how you will operate your business. The most important part of the OP will be describing your day-to-day operations and how much time will be devoted to each aspect of your business. You will also want to consider your long-term vision for the business. Planning for and demonstrating growth will be the key component to give funders confidence in your plan.

Weekly Operations Plan

We will vend at a weekly Saturday Farmer's Market in Fargo, North Dakota, during the summer months. We will also test vending at some weekday farmer's markets held on Tuesdays and Thursdays.

Company Milestones

This is your space to explain your long term vision. Dream big, but keep it realistic.

Market Analysis

This section is the backbone to your business plan. Here you will show that you have researched the industry well and have the chops to compete with the best of the best. You will be detailing your competition, your own strengths and weaknesses, and your keys for success.

Industry Profile

This section is a brief overview of the entire industry. Spend a little bit of time showing that you have researched both national and local trends.

Competition & New Entrants

Research your local competitors and highlight their strengths and weaknesses. Show that you can innovate based on the needs of your local area. Leave no stone unturned, because this section will show if you've done your homework or not.

Critical Success Factors

What innovations are you providing that will separate you from your competitors? What do you need to be successful?

Critical Risk

List all of the disadvantages you have in your business battle. And then, explain how you will overcome those.

Competitive Advantage

What sets you apart from the crowd? If you are lined up with 5 other food trucks, why would people dine with you? What about 10 others?

Marketing Plan

The Marketing Plan will be your strategy to make your presence known. This section will highlight everything that your customers want, how they can get it, and how you will deliver it.

Marketing Objective

This section is a brief description of how you want to be publicly recognized.

Target Market

Use this space to show that you know your customers and your location like the back of your hand. Identify who you are selling to, describe trends, and address how you will position yourself to take advantage of your area.

Marketing Mix

Each section below will get to the nuts and bolts of your business. Be sure to describe everything from a marketing viewpoint.

Product

Talk about your product. Think about what customers want to hear and describe it. Be unique.

Place

How will your customers get to you? What will help you stand out?

Price

Talk about your pricing strategy.

Promotion

How will you drum up interest? Talk about how you will announce your presence and how you will build upon it.

Pro Forma Financials

Use this section as an introduction to your financial statement document. Make sure to list any and all assumptions you've made in your financials and validate those assumptions. Be as transparent as possible.