Success

Plan

BECOMING AN AUTOCALL PREFERRED PARTNER

**Please customize this business plan template to tell us why you would be the ideal**

**candidate for being an Autocall Preferred Partner.**

Building Your Legacy



(Business Name)



This summary is meant to introduce us to your business.

EXECUTIVE

SUMMARY

INTRODUCTION

(Example) Arch Fire has been serving the commercial facilities in and around the Houston, TX market for 19 years. Arch Fire owner Joe Doe has over 35+ years of industry knowledge which has allowed him to build an amazing team of Sales, PM, Engineers, and technicians who can handle any size project.

Arch Inc. is currently using X-Product line which we are looking to move away from due to these reasons… Or adding this line will give us the ability to be in specific markets / verticals our current line does not offer.

As a growing company, it is our goal to continue to expand our knowledge and expertise to build a larger customer base and by being an Autocall integrator we can achieve those goals.

BUSINESS BIOGRAPHY

[Name of business] is a [type of business] that was founded in [year] by [founder's name]. Our mission is to [insert mission statement here]. We are based in [city, state/province, country] and serve the [local/regional/national/international] market(s).

Our team consists of [number] highly qualified [professionals/experts/etc.], who are dedicated to providing [superior/exceptional/etc.] [products/services] to our customers. We are committed to [ethical/sustainable/etc.] business practices and strive to [make a positive impact on our community/industry/etc.].

MARKET/TERRITORY

**Including current sales force, tech force, current revenue and how and what you want to grow that to**

Name of business] operates in the [specific industry/market] sector, targeting [customer demographic/type of business] in [region/territory] . Our current sales force consists of [number] [sales professionals/representatives] who cover [territory/region] .

We have a strong [technical team/department] consisting of [number] [technical professionals/experts] who are responsible for [developing/maintaining] our [products/services/technology].

Last year, our total sales was [amount], and we are looking to grow this to [amount] in the next [number] years through [strategies/tactics] such as [expanding our sales force/entering new markets/launching new products/etc.].

VERTICALS/BUILDING SOLUTIONS

In addition to our core business in the [industry/market] sector, we also have a presence in the following verticals:

* [Vertical 1]
* [Vertical 2]
* [Vertical 3]

Our expansion into these verticals has allowed us to [diversify our revenue streams/tap into new markets/etc.], and we are continually looking for opportunities to grow in these areas.

LONG-TERM OVERVIEW

Over the long-term (your plan for the next 3 years as an Autocall integrator), we envision [name of business] as a [market leader/innovator/etc.] in the [industry/market] sector. Our goal is to [achieve specific growth targets/expand our presence in certain markets/etc.], while maintaining our commitment to [ethical/sustainable/etc.] business practices and providing [exceptional/superior] [products/services] to our customers.

We plan to achieve this through a combination of [strategies/tactics] such as [expanding our sales force/entering new markets/launching new products/etc.], and by continuing to invest in the development of our [products/services/technology/team].

|  |  |
| --- | --- |
| **Autocall Fiscal Year** | **FY23 October 2023 to September 2024** |
|  **Fiscal Period** | Q1 | Q2 | Q3 | Q4 | Total |
| Calendar Period | Oct - Dec. | Jan. - March | April - June | July - Sept. | 10/2023 - 09/2024 |
| Headquarter | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| **Total** | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
|   |  |  |  |  |  |
| **Autocall Fiscal Year** | **FY23 October 2024 to September 2025** |
|  **Fiscal Period** | Q1 | Q2 | Q3 | Q4 | Total |
| Calendar Period | Oct - Dec. | Jan. - March | April - June | July - Sept. | 10/2024 - 09/2025 |
| Headquarter | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| **Total** | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
|   |  |  |  |  |  |
| **Autocall Fiscal Year** | **FY24 October 2025 to September 2026** |
|  **Fiscal Period** | Q1 | Q2 | Q3 | Q4 | Total |
| Calendar Period | Oct - Dec. | Jan. - March | April - June | July - Sept. | 10/2025 - 09/2026 |
| Headquarter | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Additional Offices | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| **Total** | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
|  |  |  |  |  |  |
|  |  |  |  | 3 Year Total | $0.00 |

MISCELLANEOUS

[In this section, the business can add any additional information they feel is important for us to know. This could include details about their competitive advantage, partnerships, current challenges, future plans, etc.]