

futurpreneur 

Annabee's Bakery

Business plan

1.0 Executive Summary

Company Profile Summary

Annabee's recognizes that cupcake stores have started to saturate large urban centres and that opening locations in suburban and less populated cities is the next wave of growth. Lloydminster's tourism focused BIA and growing population makes it ideal for an Annabee's location.

Annabee's is a franchise that specializes in gourmet cupcakes and tarts baked fresh daily. Annabee's is owned and operated by Elizabeth Armstrong, a graduate of the Northern Alberta Institute of Technology's culinary program and a baking enthusiast. The business will be located at 5012 49 Street in the already high trafficked downtown core.

Market Research Summary

The bakery industry continues to see growth across Canada. While some analysts report that the "cupcake bubble" is going to burst in the United States market, the Canadian market remains unaffected. Cupcakes have become a more mainstream purchase for special events and impulse purchases. In addition, Annabee's will provide individual tarts, which has been reported by foodies as "the next cupcake". Annabee's targets individuals, couples, and families seeking out an affordable indulgence that's convenient. Annabee's will focus on customers who value fresh products made of whole ingredients provided by local businesses.

Marketing Summary

Annabee's will focus on being an active member of the community, creating authentic relationships with customers and local businesses. Annabee's will launch with a grand opening party to build these relationships and create awareness of the store's location. Since Annabee's target market is making impulse purchases, it is important that Annabee's brand consistently appears at events in the community. Annabee's will further support this with direct mail campaigns that include promotional offers.

Finance Summary

Annabee's in Lloydminster is targeting sales of \$75,000 in their first year with expenses of \$40,050. Annabee's requires \$54,750 for start-up expenses, this includes the required cash reserve needed to meet the franchisee application requirements. Annabee's owner will be invested \$30,000 into the business and is seeking the remaining \$24,750 through Futurpreneur Canada and the Business Development Bank's start-up programs.

2.0 Company Profile

Business Overview

Annabee's is a bakery franchise dedicated to making delicious wholesome cupcakes and tarts baked fresh daily using whole food local ingredients. It's has a strong marketing campaign as "The Original Prairie Bakery". Annabee's also provides customized catering services for small to medium size events. Annabee's was established on 15/01/2014.

Annabee's is a premium peanut-free bakery providing delicious and beautiful desserts baked fresh daily to indulge the sweet tooth in everyone.

Annabee's is a product and service business. Annabee's product offering is divided into two main categories: cupcakes and tarts. Annabee's also offers custom cake creation and event catering services on a by-request basis.

Annabee's cupcake menu includes six flavours:

- Vanilla Bean Cake with Vanilla Buttercream Frosting
- Chocolate Cake with Chocolate Buttercream Frosting
- Red Velvet Cake with Cream Cheese Icing
- Carrot Cake with Cream Cheese Icing
- Banana Cake with Chocolate Buttercream Frosting
- Angel Food Cake with Lemon Buttercream Frosting
- Chocolate Cake with Cream Cheese Icing with Carmel Sauce and Rock Salt
- Vanilla Bean Cake with Chocolate Mint Buttercream Frosting and Cookie crumbs

Annabee's tart (3" in diameter) menu includes:

- Vanilla Custard Tart
- Butter Tart
- Chocolate Custard Tart
- Lemon Bakewell Tart
- Seasonal Fruit Tart

Company History

Annabee's is a well-known Franchise bakery located throughout Alberta, Saskatchewan, and Manitoba with an established corporate marketing campaign as "The Original Prairie Bakery". Annabee's original location opened in Calgary in 1975 by Annabelle Watson, way ahead of the cupcake trend that hit in the 21st century. Although having a long history of being in business, Annabee's has a very thorough franchise application and approval process and therefore there are only 12 franchisees currently in operation.

Elizabeth Armstrong has submitted her pre-application request to Annabee's Confectionaries Inc. to open a franchise in Lloydminster and met with a franchising representative to discuss the start-up requirements, franchisee fees and approval process. Ms. Armstrong has received conditional approval for locating her franchise in Lloydminster, subject to successful completion of the franchisee application form. Ms. Armstrong is in negotiations for the commercial lease of a location at 5012 - 49 St, Lloydminster, Alberta.

Management

Annabee's franchise is fully owned and operated by Elizabeth Armstrong, a graduate of The Northern Alberta Institute of Technology's (NAIT) renowned Culinary Arts program. Elizabeth Armstrong has known creating delicious and beautiful confectionaries was her passion since childhood. She spent many weekend and summer afternoons draped in a folded up apron watching as her grandmother produced tarts, cookies, and jams.

Ms. Armstrong's love for baking has never faltered. While attending NAIT, she worked part-time in an Annabee's franchise, first as a sale associate and then as a baker. This experience provided her exposure to the corporate support and training Annabee's provides to franchisees. Following graduation, she was hired full-time as a baker at Annabee's University of Alberta Enterprise Square location. Being at the location from its opening, helped Ms. Armstrong to realize she wanted to be the one in charge, not just baking. With the support of the franchise partner at the Alberta Enterprise Square location, she was transitioned into an assistant manager role. For the last two years she's worked as the assistant manager managing day-to-day finances while working the odd shift baking, just for the love of it!

Location

Annabee's will be a storefront. Annabee's will be located at 5012 49 St, Lloydminster, Alberta, T9V 0K2. This location was previously a coffee shop and therefore only modest renovations are required to accommodate a commercial kitchen. Annabee's will focus on selling cupcakes and tarts in the downtown core, capitalizing on the high foot traffic in the area anchored by the library. Annabee's will look into partnering with the local library and Vic Juba Community Theatre to offer birthday party packages.

Legal Structure

Annabee's is a sole proprietorship. Annabee's will open as a sole proprietorship, which complies with Annabee's franchise restrictions while also reducing start-up costs.

Annabee's is not interested in protecting their intellectual property at this time.

Vision & Mission

To become a flagship Annabee's franchise location, known for quality cupcakes and tarts, and outstanding customer service.

Annabee's provides delicious fresh cupcakes and tarts made with local wholesome ingredients for consumers to indulge their sweet tooth.

Professional Advisors

Annabee's will rely on the training and brand marketing services provided by Annabee's Confectionaries Inc. the head office of the franchise chain.

Goals & Objectives

- Steady sales of 200 cupcakes/tarts per week after two months
- 10 custom cake order in first year
- Franchisee of the Year award for outstanding customer satisfaction after two years

3.0 Market Research

Industry Profile & Outlook

Annabee's operates primarily in the bakery industry.

The bakery market in Canada is highly fragmented with many companies and products. There are a few large companies such as Weston, Kellogg, Maple Leaf Foods, etc. that have significant market share, but no one company controls the market. In fact, artisanal bakery products make up 29.5% of the market according to Agriculture and Agri-Food Canada (<http://www.ats-sea.agr.gc.ca/can/6333-eng.htm>). If looking specifically at the cupcake market, there are a few brands building market share, such as Cupcakes, Prairie Girl and Annabee's, but they have yet to expand nationally and instead are building traction in regional markets.

The bakery industry has many barriers to entry, primarily with regards to operations. Securing permits and licences can be difficult with different requirements at the municipal, provincial and federal levels. In addition, inventory management of perishable ingredients is a delicate balance to ensure the minimal amount of waste. Annabee's franchisor provides training and guidance for estimating ingredient purchase, predicting inventory spikes, and managing product production.

Annabee's also represents the increasing popularity of bakery franchises specializing in cupcakes. Consider brands like Crumbs and Magnolia's in the United States, where consumer drive to their locations for the novelty of having one of their cupcakes. Annabee's provides the same cache in the Canadian market, without having the 'big business' feel of having a location on every corner. Still, with the 'buy local' trend, Annabee's will need to develop strong relationships with the local community and business owners in order to be viewed as a sole proprietor and not a large corporation.

The gourmet cupcake segment of the bakery industry has seen exponential growth over the last decade, made popular through an appearance on Sex in the City. Although growth has slowed, the Canadian market is still going strong. Cupcakes, a Vancouver based gourmet bakery, reported that year-to-date sales were up by 24% from that same time last year in a statement to the Globe and Mail (<http://www.theglobeandmail.com/life/food-and-wine/food-trends/sweet-news-for-canadian-cupcake-lovers/article11510344/>). And they're not alone. Yummy Stuff Bakery in Toronto also reports that cupcakes are still their number one seller, with 50 to 60 per cent of Yummy Stuff's pre-ordered business coming from cupcakes and impulse purchases. (<http://www.theglobeandmail.com/life/food-and-wine/food-trends/sweet-news-for-canadian-cup->

[cake-lovers/article11510344/](#)). The price point of cupcakes and other single serve desserts provide mass appeal, as they are an “affordable indulgence”. It is for this reason a location with high foot traffic is essential for an Annabee’s franchise to cater to impulse purchases. Cupcakes also provide an alternative to cakes for special events that are more convenient and easier to serve while still providing an upscale dessert to mark the occasion.

Although many analysts have been calling for the cupcake trend bubble to burst, sales numbers continue to grow. All major Canadian cities have at least one cupcake specialty shop. Lori Joyce, co-owner of The Cupcake Girls, says “shifting taste trends won’t affect her business”. She notes in an article in MacLean’s magazine, that the suburbs are the next big growth frontier. (<http://www.macleans.ca/society/life/cupcake-gridlock/>). She goes on to note that 85% of customers to their Victoria store, buy six-packs and shop at Wal-Mart. Annabee’s looks to capitalize on a similar market by opening in Lloydminster. It’s bringing it’s well-known and wholesome brand to everyone.

Local Market

In the Lloydminster area there are currently only two independent bakeries providing gourmet cupcakes and cakes. However, there several large mixed merchandise stores on the outskirts of town, including Real Canadian Superstore, Sobeys, and Wal-Mart that sale pre-packaged cupcakes. There are also an unknown number of home bakers in the area selling online and baking in unlicensed home kitchens.

Lloydminster has a population of 30,000 across both the Alberta and Saskatchewan has seen a 13.3% growth from 2006 to 2011 according to Statistics Canada. The population increase is important since it’s been concentrated in the 0 - 14 year old and 15 - 64 age groups, which align with Annabee’s target market.

Annabee’s will be the only bakery on the Alberta side of Lloydminster. Annabee’s will target local foot traffic, comprised of youth 0 - 14 and their parents who are visiting the local library for after school programming. Annabee’s location will help to promote impulse purchases for dessert as well as, convenient options for celebrating birthdays, baptisms, graduations, and life’s other special events.

Key Competitors / SWOT Analysis

Hey Sugar!

Strengths

- Established part of the local community
- Go to destination for custom cake orders for special events

Weaknesses

- Doesn’t have the cache of Annabee’s brand

Opportunities

- Could decide to expand into the west side of Lloydminster

Threats

- Annabee's could start focusing marketing efforts on custom cake orders

Annabee's

Strengths

- Well-known brand throughout western Canada that started in Alberta
- Reputation of high quality cupcakes and tarts

Weaknesses

- Not familiar with the local market
- No established relationships with suppliers for sourcing local ingredients

Opportunities

- Partnerships with local youth focused programming to provide entertainment packages

Threats

- Hey Sugar! Could start discounting cupcakes to increase sales volume

Target Market

Annabee's is focused on selling to Consumers (B2C).

Target Market profile for Annabee's:

- Single, married or common-law woman with or without children (demographics)
- Household income: \$30,000 - \$150,000 (demographics)
- Consumers who are the primary grocery purchaser (behaviour)
- Consumers who are looking for convenient and beautiful desserts to celebrate special occasions (behaviour)
- Consumers desiring an indulgence without the purchase guilt (psychographic)
- Consumers looking to support revitalization of downtown Lloydminster (scope)

Keys to Success

Since Annabee's is an established brand with guaranteed marketing from the corporate office for the launch of the Lloydminster franchise, product quality will be critical to success. It will be the quality that will encourage people to come back and tell others about their experience. Annabee's will work to establish reliable supplier network for quality local ingredients to produce Annabee's signature line of cupcakes and tarts. Annabee's will also need to keep costs low due to the small margins the industry works within.

4.0 Sales & Marketing

Pricing Strategy

Prices range from the low end of \$2.50/cupcake or tart to \$4.75/cupcake or tart.

Competition: \$2.75/cupcake

Annabee's: \$3.00/cupcake when sold individually

Annabee's: \$2.75/cupcake when sold as a dozen

Pricing is determined as part of the Franchise agreement and cannot be altered by the individual franchisee. The price point reflects the reputation Annabee's cupcakes and tarts in the market.

Marketing Strategy

- Networking with local community

Creating hype and excitement about the opening of an Annabee's location will be critical to capturing the sale volume needed for the business to succeed. With Valentines Day following shortly after the store's opening, Annabee's will host a Grand Opening Party in January. It will be a "Beat the Winter Blues" themed event providing an opportunity for Annabee's owner Ms. Armstrong to engage with local businesses, artists and the community at large. Annabee's key strategy is to create a positive celebration atmosphere for consumers to associate with the Annabee's brand in hopes of purchasing cupcakes or tarts for their own special events. To increase awareness of the event, Annabee's will send out a postcard direct mail campaign announcing the event.

- Postcards

A secondary strategy will be to deliver a postcard to all homes in the Lloydminster area announcing the arrival of an Annabee's location in their city. It will contain a special offer for \$1 off a second cupcake with the purchase of the first at full price.

- Social Media

In social media, Annabee's will focus on Instagram and Twitter as a way to engage in an authentic manner with the community. By re-tweeting other local businesses events, thanking customers, posting behind the scenes photos and collecting input for new menu items.

Primary Marketing Activity

Annabee's' key marketing activity will kick off with Annabee's Grand Opening Party at the end of January. Prior to the event, Annabee's will send out a 4x6 postcard to 5000 homes in the Lloydminster area (both Alberta and Saskatchewan) announcing the opening and one day special offer.

The goal of this event is to create awareness and excitement about the opening of Annabee's in Lloydminster. To help build relationships within the community, Ms. Armstrong will contact the Streetscapes Committee for recommendations on local artists and bands to contact to participate in the event. Ms. Armstrong will also contact the local library to find out how the event could integrate into their existing after school programming. The goal of the event is to create a community showcase that attracts a broad range of community members to Annabee's new storefront. Ms. Armstrong would provide free refreshments and \$1.00 off the purchase of a second cupcake. The goal of

the event would be to establish Annabee's as a part of the local community and not as a 'big business'. The event would be considered a success if 500 cupcakes are sold over the course of the event.

In addition to this one time event, Annabee's would continue to foster authentic relationships with the community by joining the Lloydminster Business Improve Association (BIA) and the Streetscapes Committee. Annabee's will contribute to the economic development of the community. Ms. Armstrong would also look for less formal events to represent Annabee's at such as events at the Roots: Emporium monthly showcase, productions at Black Box Theatre, and May's Theatre Monthly Critics Night Out. Ms. Armstrong will attend all events in casual attire fitting of the event. She will also closely monitor community calendars for proposed events that correlate with spikes in Annabee's sales, such as Valentines Day, Mother's Day, Easter, and Christmas.

The goal will be to attend events weekly throughout the year, building up trust and good will within the community. In addition, Annabee's will provide product donations once a month totally a cost of no more than \$70 dollars. Each product donation will require the recipient to include acknowledgement of Annabee's in event collateral or signage. The monthly costs for attending events and providing donations will range from \$50 - \$100. It is expected that traffic driven through these events to the retail store will result in the sale of 500 - 800 cupcakes per month.

Marketing Objectives

Goal #1: Addition to the Streetscapes.ca website business directory

Goal #2: Attendance of 4 community events per month starting in February

Goal #3: 100 Twitter follows after one month in business

Positioning Statement

Annabee's provides fresh gourmet cupcakes and tarts made with local wholesome ingredients for consumers to indulge their sweet tooth.

The Sales Process

Annabee's sales cycle timeline is <24hrs.

For the majority of Annabee's sales, the process will involve customers walking into the store and being greeted by a sales associate. Alternatively, during the summer months, customers may be greeted on the street outside the store with free tart samples and encouraged to enter. Annabee's anticipates an 80 - 90% conversion of customers who enter the store to purchase a cupcake or tart. Payment is due at the time of order for the full amount.

For custom cake and catering orders, the process will involve the potential customer coming into the store or calling. If the inquiry is made in person, the Annabee's sales associate will review the catering and/or custom cake options with the customer while showing them example photos. During the call or meeting, the Annabee's sales associate will request details about the number of people, date, type of event, food being served, etc. to help the customer decide on the best option and amount needed for their event.

This also allows Annabee's to confirm they are able to accommodate the order in their workload. Using the calculator kept near the phone and cash, the associate will provide an estimate of the total costs to the customer.

For 75% of inquiries made, the sale is approved during the initial meeting with Annabee's requiring full payment via a credit card, debit or cash at time of order. Annabee's sales associate completes the paper order form with the details from the conversation and provides it to the customer for review. If a custom inscription or design is required, the customer is asked to initial the messaging/description as confirmation it is correct. The customer leaves with a copy of their invoice and details for pickup.

5.0 Operations

Location(s)

Annabee's will be a storefront. Annabee's will be located at 5012 49 St, Lloydminster, Alberta, T9V 0K2. This location was previously a coffee shop and therefore only modest renovations are required to accommodate a small commercial kitchen for the bakery. In addition, this location is in the heart of the downtown, included in the Lloydminster Art Walk tour map, and across from the local library where several after school programs operate. Annabee's store hours of operation will be: Tuesday - Friday 2pm to 6pm and Saturday - Sunday 10am - 4pm.

These hours will allow for baking products in the mornings prior to the store opening, as well as working on custom cake and catering orders without having to manage a retail store counter at the same time.

Annabee's website will launch/launched on 01/01/2014.

Annabee's Lloydminster location will appear on the corporate website's store locator. Annabee's will not have it's own individual website.

Annabee's Lloydminster location will create Instagram and Twitter accounts to post photos of their creations as well as engage with customers and local businesses. Ms. Armstrong will be responsible for creating and posting content to both the Instagram and Twitter accounts.

Legal Issues

Annabee's anticipates the following legal issues:

- business licenses
- location & zoning by-laws
- health inspection
- contract agreements (partnerships, independent contractors etc.)

Annabee's has visited the Lloydminster Biz Pal website (<http://www.lloydminstereconomy.ca/bizpal>) and started organizing and applying for permits as needed. These include a Business License, Food Handling Permit and Sign Permit. Ms. Armstrong has also

reached out to the Lloydminster Region Community Futures organization for legal and accounting referrals.

Human Resources

Annabee's will have 1 - 10 full time staff.

Annabee's will have 0 part time staff.

Annabee's will start out small with the owner as the only employee. Ms. Armstrong has contacted the local high school's guidance counsellors to ask for student referrals for occasional part-time sales help from students interested in the culinary arts. Ms. Armstrong anticipates needing occasional support at peak sales points during the year (Valentines Day, Mother's Day, Easter, and Christmas).

Process/Production

1. Annabee's will order ingredients from Churchill Farms, Rotman Farms, and Linden Wholesalers. Contact has been made with all suppliers and a review of their reliability has been conducted. Terms for deliveries have been agreed upon, with Annabee's placing orders on Friday and delivery of orders happening the following Tuesday (4 day turnaround). For occasional seasonal ingredient orders, Annabee's has arranged supplier to contact her when ingredients are set to become available (harvest) so orders can be updated to include purchase of the seasonal items.
2. The cupcakes and tarts will be made from whole ingredients without the addition of preservatives. The main ingredients will be flour, eggs, butter, and sugar. As part of the Annabee's franchise, the recipes for each cupcake/tart will be supplied.
3. Ms. Armstrong will be responsible for baking all cupcakes and tarts. Baking will occur daily in the morning prior to the store's retail hours. The kitchen is visible from the retail setting and outside, therefore all production materials will need to be cleaned immediately following use and stored.
4. Cupcakes and tarts not sold during the day are stored in the commercial fridge for up to 2 days. After this time, the products are discarded.
5. At the time of purchase, cupcakes and tarts will be served to customers for immediate consumption in the small seating at the front of the store. Alternatively, customers receive their cupcakes in single, 6 pack or 12 pack paper boxes that include dividers to keep cupcakes from touching.

Risk Assessment

Annabee's will spend the majority of its marketing efforts in promoting the brand and engaging with the community. However, should these efforts prove to be ineffective, Annabee's would increase their marketing spend and purchase advertising in the local newspaper and online directories.

Annabee's strength is that it is an established brand with a perception of beautiful and

delicious cupcakes and tarts. If for some reason, Ms. Armstrong is unable to produce a quality product, the store would have to close temporarily while Ms. Armstrong attended further corporate training.

If, after a full year of business, sales are less than \$50,000 (cumulative) Annabee's would look for another buyer to transfer their Franchisee license too. If Annabee's is unable to find a buyer, it would close its door, sell off all kitchen equipment and store fixtures and close both the Instagram and Twitter accounts.

6.0 Financials

Start-Up Costs

The example business plans do not include start-up costs, cash flow or income statement example content. To review how to create these elements for your business, please visit www.futurpreneur.ca/en/bplan and use the free online business plan writer. Not only does it provide tips and tricks on what to include but it outputs a custom spreadsheet with all the formulas you'll need.

Break Even

Fixed costs for the year are \$30,800 (includes rent, franchise fee, renovations, equipment, permits, utilities, marketing, loan payments)

Average sale price is \$2.99/cupcake or tart (assume 95% sold at individual price and 5% sold at dozen bulk price)

Average production cost is \$1.46/cupcake or tart (ingredients, royalties, corporate advertising fee and HST)

Break-even point:

$$\frac{\$30,800}{\$2.99 - \$1.44} = \frac{\$30,800}{\$1.55} = 21,096 \text{ units}$$

Annabee's would start to make a profit after selling 21, 096 cupcakes or tarts.

Sales Forecast

- No custom cake or catering orders in the first month
- Slowest months: January, September, and November (why sept and nov?)
- Products sales broken out 90% individual cupcake/tart sales and 10% bulk orders of at least a dozen cupcake/tarts
- Walk-in customers will purchase a minimum of two cupcake/tarts per average order (\$6)
- Walk-in bulk order will purchase one dozen cupcake/tarts per average order (\$33)

- 90% of purchasers will become repeat customers within the first six months
- 15% redemption of postcard offer in stores

Year One Sales Forecast (Including Assumptions)

January - \$2,179

- \$1,300 – Grand opening party January 15 sale of 500 cupcakes (300 @ \$3, 200 @ \$2)
- \$198 – 6 dozen walk-in purchases of bulk cupcakes
- \$780 – 130 walk-in individual sales
- Attended Lloydminster BIA meeting
- Meeting with Head Librarian regarding partnership opportunities for after school programming.
- Posted party photos onto Instagram and Twitter during party. Included customer Twitter/Instagram accounts as mentions.
- 9 Twitter/Instagram posts with photos of finished products and behind the scene baking shots

February - \$4,476

- \$3000 – 500 walk-in individual sales on Valentine's day
- \$960 – 160 walk-in sales for the rest of the month
- \$264 – 8 dozen walk-in purchases of bulk cupcakes
- \$120 – custom 'anti-Valentine's' day cake for singles event
- \$132 – 8 dozen tart/cupcake sold for event catering
- Follow up meeting with Librarian about March break school programming
- Donated two dozen cupcakes/tarts to Sadie Hawkins Dance at Lloydminster High school
- Attended planning meeting for Spring Artwalk event for Streetscapes committee
- Attended Black Box theatre's community theatre showcase
- Meeting with Harvest to Home about potential opportunity for a co-sponsored cooking class
- Attended gallery opening at Lloydminster Culture and Science Centre
- 15 posts to Twitter/Instagram with photos. Several around the baking preparation for Valentines Day. Retweet of customer tweets mentioning Annabee's

March - \$6,639

- \$5,250 – 1000 walk-in individual sales (750 postcard promotions & 250 regular)
- \$429 – 13 dozen walk-in purchases of bulk cupcakes
- \$660 – St. Patrick's Day themed cupcake custom bulk order (10 orders)
- \$300 – March Break catering order with library for camp program

- Distribution of 10,000 Buy 1 cupcake/tart get a second for \$1 off postcards to Lloydminster area expires April 15.
- Meeting with Black Box Theatre about upcoming season of programming and cupcakes at concession
- Attended Lloydminster BIA meeting
- Attended planning meeting for Spring Artwalk event for Streetscapes committee
- Hosted a “Rural Routes” home concert series
- 15 posts to Twitter/Instagram with photos.

Year Two Sales Forecast

Cash flow

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Income Statement

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