

Who is Palo Alto Software?

Palo Alto Software was founded in 1983 and is the leader in business planning software. The company's flagship product, LivePlan, is the most complete business planning and small business tracking tool on the market. The company's content site, Bplans.com, ranks as the highest-trafficked business planning website. Palo Alto Software is a privately-owned corporation based in Eugene, Oregon.

Online:

paloalto.com | liveplan.com | bplans.com | mplans.com

Leadership:

Tim Berry, Founder and Chairman

Sabrina Parsons, Chief Executive Officer

Noah Parsons, Chief Operating Officer

Trevor Betenson, Chief Financial Officer

Josh Cochrane, Vice President of Product Development

Caroline Cummings, Vice President of Marketing

Market Acceptance:

- Market leader in business planning software
 - 75% market share
- Leading Web presence in business planning
- In business more than 20 years
- Excellent retail distribution
 - Staples, OfficeMax, Office Depot, Amazon.com, etc.
- 100% bootstrapped and profitable

Online Leaders:

- 1.5 million+ monthly unique visitors on site network
- Top-3 Google organic rank for all core "business plan" terms
- 6.5 million page views/month

Strategic Partnerships:

- Inc. Magazine
- Entrepreneur
- The Wall Street Journal
- Bloomberg Businessweek
- Startup America
- SBA, SBDC, SCORE
- Barclay's

Corporate Boilerplate:

Palo Alto Software, Inc., makers of the #1 selling business planning software in the world, develops and publishes tools, products, and content to help small and mid-sized businesses plan, pitch and manage their venture. LivePlan, the company's flagship product, is a SaaS (software as a service) solution for business planning and management. Palo Alto Software has been the market leader in its category for over fifteen years, has served well over 1 million entrepreneurs, and has customers in 180 countries. Founded in 1988 by business planning expert Tim Berry, the company is a privately-owned corporation based in Eugene, Oregon.

Software Products:

LivePlan - \$19.95 per month or \$139.95 per year

- Cloud-based software to plan, pitch and track your business
- Integrates w/ QuickBooks to compare to financial reality

Business Plan Pro - \$99-\$199

- #1 best-seller 16 years running

Sales & Marketing Pro - \$179

- Formerly Marketing Plan Pro: #1 best-seller 9 years running
- #1 choice in academia

Email Center Pro - \$20/agent/month

- SaaS email management for customer service teams

Entrepreneurship Curriculum:

Start, Run & Grow Your Business

- Developed by business planning expert, Tim Berry
- Complete curriculum including student/instructor resources, books and software
- The only educational course certified by the Association of Small Business Development Centers (ASBDC)

Target Customers:

- First-time / serial entrepreneurs
- Small business owners or managers
- Educators and students



Timeline/Milestones:

- 1983 Tim Berry founds Palo Alto Software
- 1991 Moved to Eugene, Oregon
- 1993 Tim Berry authors the first business plan software
- 1994 Business Plan Pro released
- 2004 Launches Sales and Marketing Pro
- 2007 Names new CEO, COO, VP of Product Development
- 2008 Palo Alto Software launches Email Center Pro
- 2009 Eugene Area Chamber of Commerce awards Palo Alto Software with Business of the Year
- 2009 Start, Run & Grow Your Business entrepreneurship course receives ASBDC certification
- 2011 Launches cloud-based LivePlan
- 2012 Launches School of Business partnership with Udemy
- 2012 Launches the annual LivePlan \$10,000 Boost
- 2012 Launches the national SBDC Entrepreneur Champion of the Year award
- 2013 Launches first ever state-wide business plan competition with the Business & Entrepreneurship Center