


BUSINESS PLAN [YEAR]




Book Store

Come alone, leave with a new lesson.

 **John Doe**

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Information provided in this business plan is unique to this business and confidential; therefore, anyone reading this plan agrees not to disclose any of the information in this business plan without prior written permission of the company.

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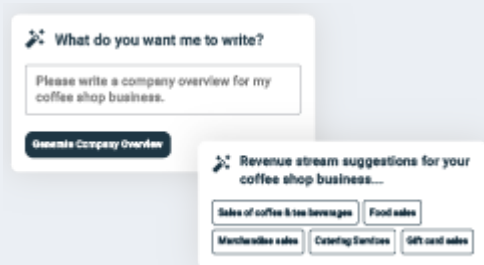
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1.

Executive Summary

Mission Statement

Vision Statement

Customer Focus

Success Factors

Financial Summary



REMEMBER

Before you think about how to start a Bookstore business, you must create a detailed Bookstore business plan. It will not only guide you in the initial phases of your startup but will also help you later on.

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Maxwell Bookstore

Maxwell Bookstore is a neighborhood bookstore that will be located in a centralized area between a residential neighborhood and a busy educational district in Detroit, Michigan. We conducted our feasibility studies and market survey and we came to the conclusion that...

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Mission Statement

Maxwell Bookstore

Our mission is to establish a bookstore business that will make available a wide range of books and stationeries from top brands at affordable prices to the residence of Detroit – Michigan and other cities in the United States of America where we intend to open branches.

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Vision Statement

Maxwell Bookstore

Our vision is to establish a one-stop book store in Detroit – Michigan and in other cities in the United States of America.

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Customer Focus

Maxwell Bookstore

Maxwell Bookstore will primarily serve the residents who live within a 10- mile radius of our store. The demographics of these customers are as follows:

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Success Factors

Maxwell Bookstore

Maxwell Bookstore is uniquely qualified to succeed for the following reasons:

- There is currently no independent book store in the community we are entering. In

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Financial Summary

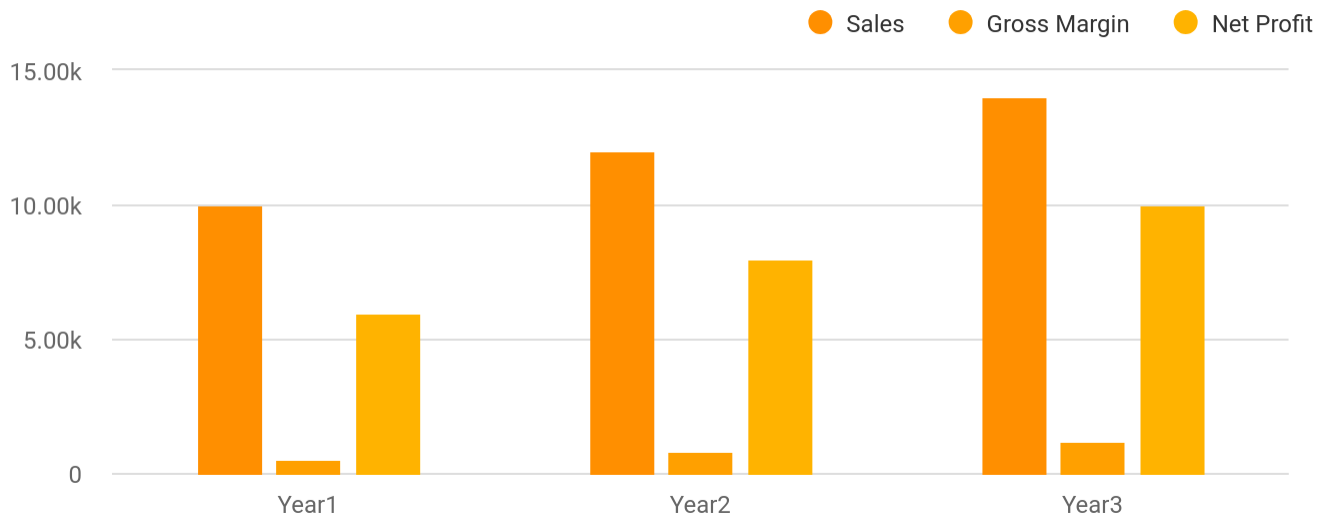
Maxwell Bookstore

Maxwell Bookstore is currently seeking \$330,000 to launch. Specifically, these funds will be used as follows:

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3 Year profit forecast



Maxwell Bookstore

Financial Summary	Year 1	Year 2	Year 3

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2.

Company Summary

History

Business Structure

Startup summary

Store Design

Maxwell Bookstore

Maxwell Bookstore is owned by Mr. John Moore and his family. She has successfully managed several retailing businesses both in Detroit and New York prior to opening her own book store. She has a Degree in Business Administration and she will run the busi

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History

Maxwell Bookstore

Upon returning from Fort Lauderdale and surveying the local customer base, John Moore incorporated Maxwell Bookstore as an S-Corporation in 2015.


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Business Structure

Maxwell Bookstore

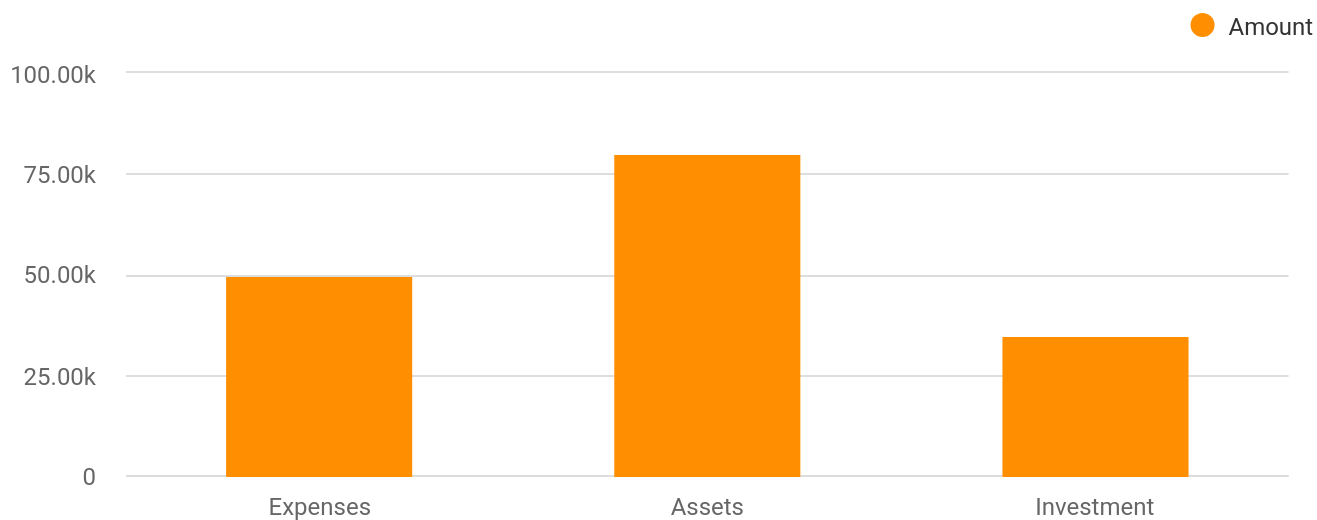
Maxwell Bookstore does not intend to start a bookstore business like the usual mom and pop business around the street corner; our intention of starting a bookstore business is to build a standard book store that will be a one-stop-shop for household needs

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Startup summary

Startup cost



Cost distribution	Amount
Expenses	50,000
Assets	80,000
Investment	35,000

Start-up Expenses	Amount
Legal	\$75,500
Consultants	\$0
Insurance	\$62,750
Rent	\$22,500
Research and Development	\$42,750
Expensed Equipment	\$42,750
Signs	\$1,250
TOTAL START-UP EXPENSES	\$247,500
Start-up Assets	\$0
Cash Required	\$322,500
Start-up Inventory	\$52,625
Other Current Assets	\$222,500

Start-up Expenses	Amount
Long-term Assets	\$125,000
TOTAL ASSETS	\$121,875
Total Requirements	\$245,000
START-UP FUNDING	\$0
START-UP FUNDING	\$273,125
Start-up Expenses to Fund	\$121,875
Start-up Assets to Fund	\$195,000
TOTAL FUNDING REQUIRED	\$0
Assets	\$203,125
Non-cash Assets from Start-up	\$118,750
Cash Requirements from Start-up	\$0
Additional Cash Raised	\$118,750
Cash Balance on Starting Date	\$121,875
TOTAL ASSETS	\$0
Liabilities and Capital	\$0
Liabilities	\$0
Current Borrowing	\$0
Long-term Liabilities	\$0
Accounts Payable (Outstanding Bills)	\$0
Other Current Liabilities (interest-free)	\$0
TOTAL LIABILITIES	\$0
Capital	\$0
Planned Investment	\$0
Investor 1	\$312,500
Investor 2	\$0
Other	\$0
Additional Investment Requirement	\$0
TOTAL PLANNED INVESTMENT	\$695,000

Start-up Expenses	Amount
Loss at Start-up (Start-up Expenses)	\$313,125
TOTAL CAPITAL	\$221,875
TOTAL CAPITAL AND LIABILITIES	\$221,875
Total Funding	\$265,000

Store Design

Maxwell Bookstore

Maxwell Bookstore will develop a 5,000 square foot store whose key elements will include the following:

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3.

Products and services

Maxwell Bookstore

Maxwell Bookstore is going to operate a standard and registered neighborhood bookstore that will retail a wide range of items from both local manufacturers and international manufacturers just like any other registered and standard book store in the United States.

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Trade books



Religious goods (including books)



Textbooks



Magazines and newspapers



Retailing new books (including e-books)



Retailing newspapers



Retailing magazines and other periodicals

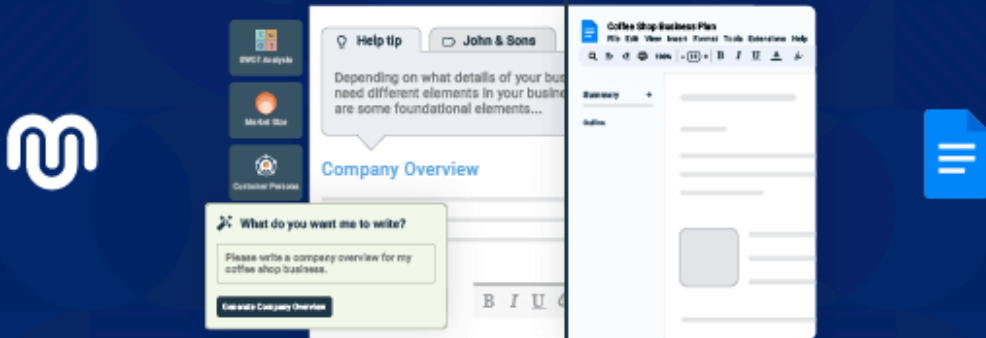


Retailing of stationery

Pens, pencils, erasers, writing pads, notice boards, writing boards, crayons, water colors, plaster of Paris, stick – on, and cardboards et al

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You have a unique business with a distinct vision, and your business plan must reflect that. Although it won't be possible with generic templates.



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4.

Market Analysis

Industry Analysis

Target Market



REMEMBER

The most important component of an effective Bookstore business plan is its accurate marketing analysis. If you are starting on a smaller scale, you can do marketing analysis yourself by taking help from

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Industry Analysis

Maxwell Bookstore

One notable trend in the retailing com bookstore industry is the ever-changing consumer behavior and of course, increasing competition from e-commerce and alternative retailers like mass merchandisers et al. This trend is part of what is responsible for

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Target Market

Maxwell Bookstore

When it comes to selling items that are found in bookstores, there is indeed a wide range of available customers. In essence, our target market can't be restricted to just a group of people, but all those who reside in the locations where we intend to open our

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5.

SWOT Analysis

Maxwell Bookstore

Our intention of starting just one outlet of our book store in Detroit – Michigan is to test run the business for a period of 2 to 4 years to know if we will invest more money, expand the business and then open other chains of book stores all over Michigan and perh

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Strength

Our location, the business model we will be operating on (a one-stop physical store and online store), varieties of payment options, a wide range of books and stationeries from local and international manufacturing brands, and our excellent customer service culture will definitely count as a strong strength for Maxwell Bookstore.

Weakness

A major weakness that may count against us is the fact that we are a new bookstore in Detroit and we don't have the financial capacity to engage in the kind of publicity that we intend to give the business.

Opportunity

The fact that we are going to be operating our book store in one of the busiest school districts with the right demographic composition in Detroit – Michigan provides us with unlimited opportunities to sell our items to a large number of people.

We have been able to conduct thorough feasibility studies and market surveys and we know what our potential customers/residents within the location where our book store will be located will be looking for when they visit our bookstore. We are well-positioned to take on the opportunities that will come our way.

Threat

We are quite aware that just like any other business, one of the major threats that we are likely going to face is an economic downturn. It is a fact that the economic downturn affects purchasing power.

Another threat that may likely confront us is the arrival of a new bookstore in the same location where ours is located or even the arrival of a mall where books and stationeries are retailed etc.

6.

Strategy & Implementations

Sales Strategy

Sales Forecast

Advertising Strategy

Pricing Strategy



REMEMBER

After identifying the market demand, market trends, and the potential customers of the startup, the next step is to define an effective strategy for attracting those customers. Like marketing analysis

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Sales Strategy

Maxwell Bookstore

Since our store will be a stand-alone facility, there is little in the way to directly influence how we close the sale other than to have an attractive storefront with our low prices and excellent selection. We believe this in itself is its own seller. One critical proced

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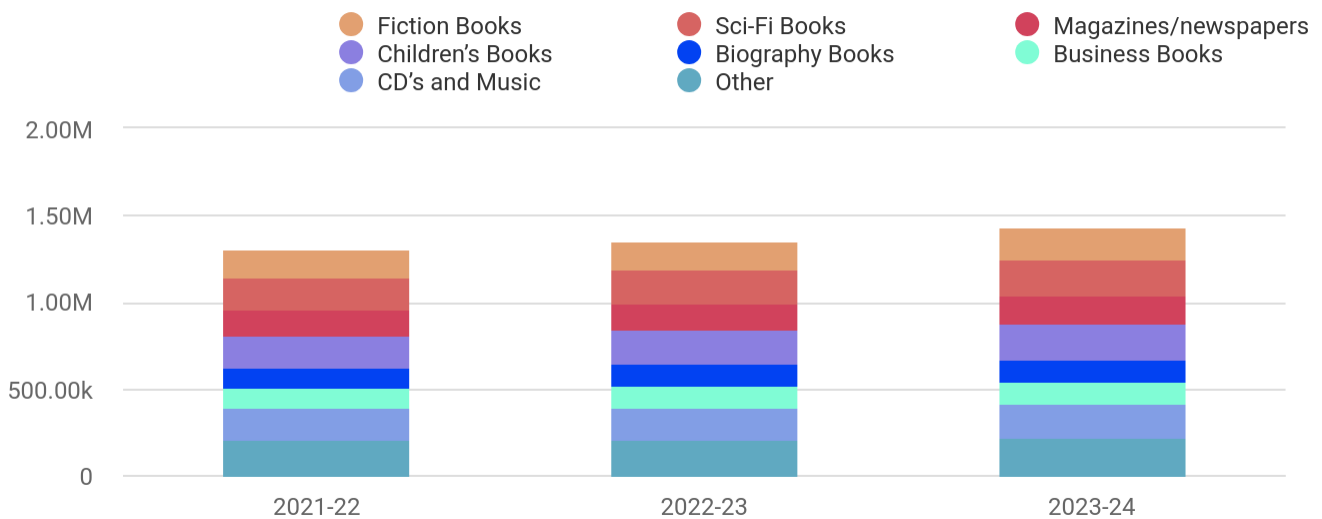
Sales Forecast

Maxwell Bookstore

Based on a 10% mark-up, our forecasted sales will increase by an average of 4.5% from year to year.

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Financial Year	Fiction Books	Sci-Fi Books	Magazines/n...	Children's Bo...	Biography Bo...	Busines
2021-22	164,292	184,829	143,756	184,829	123,219	
2022-23	172,507	194,070	150,944	194,070	129,380	
2023-24	182,512	205,327	159,698	205,327	136,884	

Advertising Strategy

Maxwell Bookstore

Maxwell Bookstore expects its target market to be individuals living within a 10-mile radius of its store. The Company's promotions strategy to reach these individuals includes:

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Maxwell Bookstore

Maxwell Bookstore will blanket neighborhoods surrounding its locations with direct mail pieces. These pieces will offer discounts and/or provide other inducements for people to visit the store.

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Direct Mail

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Maxwell Bookstore

We will contact all local and area newspapers and television stations and send them a press release describing the opening and unique value proposition of Maxwell Bookstore.

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Public Relations

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Maxwell Bookstore

Maxwell Bookstore will initially advertise in local newspapers and sponsor community events in order to gain awareness.


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Advertising

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Maxwell Bookstore

Maxwell Bookstore will maintain a website and publish a monthly email newsletter to tell customers about new events, products, and more.

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Ongoing Customer Communications

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Maxwell Bookstore

Before opening the store, Maxwell Bookstore will organize pre-opening events designed for local merchants and press contacts to create buzz and awareness for Maxwell Bookstore.

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Pre-Opening Events

Start writing here..

Pricing Strategy

Maxwell Bookstore

We believe so much in keeping our prices at the barest minimum, and that is why we will make sure that our price doesn't end up scaring people. Pricing is one of the key factors that gives leverage to bookstores and retailing business generally, it is normal for

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7.

Financial Plan

Important Assumptions

Break-even Analysis

Projected Profit and Loss

Projected Cash Flow

Projected Balance Sheet

Business Ratios



REMEMBER

The last component of the Bookstore business plan is an in-depth financial plan. The financial plan crafts a detailed map of all the expenses needed for the startup and how these expenses will be met by

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Maxwell Bookstore

The company will be financed by John himself and he will control the direction of the business to make sure that it is expanding at the forecasted rate. As for the Bookstore business start-up, no equity funding or outside loans will be required. With the help of fir

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Important Assumptions

The financial projections of the company are forecast on the basis of the following assumptions. These assumptions are quite conservative and are expected to show deviation but to a limited level such that the company's major financial strategy will not be affected.

	Year 1	Year 2	Year 3
Plan Month	1	2	3
Current Interest Rate	10,00%	11,00%	12,00%
Long-term Interest Rate	10,00%	10,00%	10,00%
Tax Rate	26,42%	27,76%	28,12%
Other	0	0	0

Brake-even Analysis

Monthly Units Break-even	5530
Monthly Revenue Break-even	\$159 740
Assumptions:	
Average Per-Unit Revenue	\$260,87
Average Per-Unit Variable Cost	\$0,89
Estimated Monthly Fixed Cost	\$196 410

Projected Profit and Loss

	2024	2025	2026
Revenue	\$434,026.10	\$958,267.90	\$1,679,955.10
Book Sales	\$159,171.40	\$285,849.20	\$513,343.20
Unit Sales	7,959	14,292	25,667
Unit Price	\$20	\$20	\$20
Special Orders	\$112,694.50	\$180,435.50	\$288,886.50
Unit Sales	2,254	3,609	5,778
Unit Price	\$50	\$50	\$50
Membership Fees	\$162,160.20	\$491,983.20	\$877,725.40
Users	2,546	5,485	8,956
Recurring Charges	\$10	\$10	\$10
Cost Of Sales	\$149,080.51	\$166,321.37	\$187,839.54
General Costs	\$149,080.51	\$166,321.37	\$187,839.54
Book Purchases	\$128,680.51	\$145,165.37	\$165,899.10
Purchase of Books	\$120,000	\$126,000	\$132,300
Shipping Costs	\$8,680.51	\$19,165.37	\$33,599.10
Store Operations	\$20,400	\$21,156	\$21,940.44
Store Supplies	\$6,000	\$6,180	\$6,365.40
Utilities	\$14,400	\$14,976	\$15,575.04
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$284,945.59	\$791,946.53	\$1,492,115.56

	2024	2025	2026
Gross Margin (%)	65.65%	82.64%	88.82%
Operating Expense	\$503,172	\$521,360.88	\$540,255.36
Payroll Expense (Indirect Labor)	\$445,572	\$461,300.88	\$477,620.28
Store Operations	\$174,900	\$181,395	\$188,147.16
Store Manager	\$62,400	\$65,520	\$68,796
Cashiers	\$112,500	\$115,875	\$119,351.16
Sales and Marketing	\$146,760	\$152,357.40	\$158,169.12
Sales Associates	\$92,160	\$95,846.40	\$99,680.16
Marketing Coordinator	\$54,600	\$56,511	\$58,488.96
Inventory and Stock	\$123,912	\$127,548.48	\$131,304
Inventory Manager	\$57,912	\$60,228.48	\$62,637.60
Stock Personnel	\$66,000	\$67,320	\$68,666.40
General Expense	\$57,600	\$60,060	\$62,635.08
Marketing and Advertising	\$18,000	\$18,780	\$19,595.40
Online Advertising	\$12,000	\$12,600	\$13,230
Print and Media Advertising	\$6,000	\$6,180	\$6,365.40
Utilities and Rent	\$33,600	\$35,172	\$36,820.44
Electricity	\$3,600	\$3,672	\$3,745.44
Rent	\$30,000	\$31,500	\$33,075
Operations and Maintenance	\$6,000	\$6,108	\$6,219.24
Management Software Subscription	\$2,400	\$2,400	\$2,400
Maintenance and Repairs	\$3,600	\$3,708	\$3,819.24
Bad Debt	\$0	\$0	\$0

	2024	2025	2026
Amortization of Current Assets	\$0	\$0	\$0
EBITDA	(\$218,226.41)	\$270,585.65	\$951,860.20
Additional Expense	\$5,544.04	\$3,923.01	\$2,219.01
Long Term Depreciation	\$1,263.60	\$1,263.60	\$1,263.60
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	(\$219,490.01)	\$269,322.05	\$950,596.60
Interest Expense	\$4,280.43	\$2,659.39	\$955.41
EBT	(\$223,770.45)	\$266,662.64	\$949,641.19
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$657,796.55	\$691,605.26	\$730,313.91
Net Income	(\$223,770.45)	\$266,662.64	\$949,641.19
Net Income (%)	(51.56%)	27.83%	56.53%
Retained Earning Opening	\$0	(\$233,770.45)	\$17,892.19
Owner's Distribution	\$10,000	\$15,000	\$15,000
Retained Earning Closing	(\$233,770.45)	\$17,892.19	\$952,533.38

Projected Cash Flow

	2024	2025	2026
Cash Received	\$434,026.10	\$958,267.90	\$1,679,955.10

	2024	2025	2026
Cash Paid	\$656,532.95	\$690,341.66	\$729,050.31
COS & General Expenses	\$206,680.51	\$226,381.37	\$250,474.62
Salary & Wages	\$445,572	\$461,300.88	\$477,620.28
Interest	\$4,280.43	\$2,659.39	\$955.41
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	(\$222,506.85)	\$267,926.24	\$950,904.79
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$7,000	\$0	\$0
Net Cash From Investments	(\$7,000)	\$0	\$0
Amount Received	\$150,000	\$0	\$0
Loan Received	\$100,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$50,000	\$0	\$0
Amount Paid	\$41,684.64	\$48,305.67	\$50,009.66
Loan Capital	\$31,684.65	\$33,305.69	\$35,009.66
Dividends & Distributions	\$10,000	\$15,000	\$15,000
Net Cash From Financing	\$108,315.36	(\$48,305.67)	(\$50,009.66)
Summary			
Starting Cash	\$0	(\$121,191.49)	\$98,429.08

	2024	2025	2026
Cash In	\$584,026.10	\$958,267.90	\$1,679,955.10
Cash Out	\$705,217.59	\$738,647.33	\$779,059.97
Change in Cash	(\$121,191.49)	\$219,620.57	\$900,895.13
Ending Cash	(\$121,191.49)	\$98,429.08	\$999,324.21

Projected Balance Sheet

	2024	2025	2026
Assets	(\$115,455.09)	\$102,901.88	\$1,002,533.41
Current Assets	(\$121,191.49)	\$98,429.08	\$999,324.21
Cash	(\$121,191.49)	\$98,429.08	\$999,324.21
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$5,736.40	\$4,472.80	\$3,209.20
Gross Long Term Assets	\$7,000	\$7,000	\$7,000
Accumulated Depreciation	(\$1,263.60)	(\$2,527.20)	(\$3,790.80)
Liabilities & Equity	(\$115,455.10)	\$102,901.85	\$1,002,533.38
Liabilities	\$68,315.35	\$35,009.66	\$0
Current Liabilities	\$33,305.69	\$35,009.66	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$33,305.69	\$35,009.66	\$0
Long Term Liabilities	\$35,009.66	\$0	\$0

	2024	2025	2026
Long Term Debt	\$35,009.66	\$0	\$0
Equity	(\$183,770.45)	\$67,892.19	\$1,002,533.38
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$50,000	\$50,000	\$50,000
Retained Earnings	(\$233,770.45)	\$17,892.19	\$952,533.38
Check	\$0	\$0	\$0

Business Ratios

	Year 1	Year 2	Year 3	Industry Profile
Sales Growth	4,35%	30,82%	63,29%	4,00%
Percent of Total Assets				
Accounts Receivable	5,61%	4,71%	3,81%	9,70%
Inventory	1,85%	1,82%	1,79%	9,80%
Other Current Assets	1,75%	2,02%	2,29%	27,40%
Total Current Assets	138,53%	150,99%	163,45%	54,60%
Long-term Assets	-9,47%	-21,01%	-32,55%	58,40%
TOTAL ASSETS	100,00%	100,00%	100,00%	100,00%
Current Liabilities	4,68%	3,04%	2,76%	27,30%
Long-term Liabilities	0,00%	0,00%	0,00%	25,80%
Total Liabilities	4,68%	3,04%	2,76%	54,10%
NET WORTH	99,32%	101,04%	102,76%	44,90%
Percent of Sales				
Sales	100,00%	100,00%	100,00%	100,00%

	Year 1	Year 2	Year 3	Industry Profile
Gross Margin	94,18%	93,85%	93,52%	0,00%
Selling, General & Administrative Expenses	74,29%	71,83%	69,37%	65,20%
Advertising Expenses	2,06%	1,11%	0,28%	1,40%
Profit Before Interest and Taxes	26,47%	29,30%	32,13%	2,86%
Main Ratios				
Current	25,86	29,39	32,92	1,63
Quick	25,4	28,88	32,36	0,84
Total Debt to Total Assets	2,68%	1,04%	0,76%	67,10%
Pre-tax Return on Net Worth	66,83%	71,26%	75,69%	4,40%
Pre-tax Return on Assets	64,88%	69,75%	74,62%	9,00%
Additional Ratios				
Net Profit Margin	19,20%	21,16%	23,12%	N.A.
Return on Equity	47,79%	50,53%	53,27%	N.A.
Activity Ratios				
Accounts Receivable Turnover	4,56	4,56	4,56	N.A.
Collection Days	92	99	106	N.A.
Inventory Turnover	19,7	22,55	25,4	N.A.
Accounts Payable Turnover	14,17	14,67	15,17	N.A.
Payment Days	27	27	27	N.A.
Total Asset Turnover	1,84	1,55	1,26	N.A.
Debt Ratios				
Debt to Net Worth	0	-0,02	-0,04	N.A.
Current Liab. to Liab.	1	1	1	N.A.
Liquidity Ratios				
Net Working Capital	\$120 943	\$140 664	\$160 385	N.A.
Interest Coverage	0	0	0	N.A.
Additional Ratios				
Assets to Sales	0,45	0,48	0,51	N.A.

	Year 1	Year 2	Year 3	Industry Profile
Current Debt/Total Assets	4%	3%	2%	N.A.
Acid Test	23,66	27,01	30,36	N.A.
Sales/Net Worth	1,68	1,29	0,9	N.A.
Dividend Payout	0	0	0	N.A.

Upmetrics vs Financial Spreadsheets

Spreadsheets can be a powerful tool for preparing complex financial reports and forecasts. However, using them can be quite time-consuming, intimidating, and frustrating.

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Mariia Yevlash



Student, Sumy State University – Ukraine

The most helpful feature was to make a business plan out of a simple idea. Thankful for all the tools provided, **especially AI which did a great impact on my work.**

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