



Event Planning

ADDRESS

10200 Bolsa Ave, Westminster, CA, 92683
<http://www.example.com>

CONTACT

(650) 359-3153
info@example.com

Business Plan

[YEAR]

Prepared By

John Doe



Dream fulfillment

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

Table of Contents

Executive Summary 6

Business Overview	7
Objectives	7
Management	8
John Doe	8
Mission	8
Keys to Success	8
Financial Highlight	9
Net Income & Gross Margin	9

Business Summary 10

About Business	11
Business Ownership	11
Start-up Summary	11
Startup Expense	11
Start-up Assets	12
Funding	12
Location	13
Office Design	13

Products and Services 14

Products and Services	15
Party Pack	15
Step-by-Step Guides	15
Event Planning Software	16
Resources Manual	16
Event Planners Training Institute	16
Competitive Comparison	17

Market Analysis

18

Market Segmentation	19
Private Organizations and Businesses	19
Public Organizations	19
Age Breakdowns	20
Customer Segmentation	20
Target Market Segment Strategy	21
Service Business Analysis	21
Hotels and Conference Centers	21
Other Event Planners	22
Employees or Persons wishing to do it themselves	22

Marketing and Sales

23

Marketing and Competition	24
Sales Strategy	24
Private and Public Organizations	24
Individuals	24
Sales Forecast	25
Sales	25

Management and Operations

26

Management Summary	27
Organizational Structure	27
Personnel Plan	27

Financial Plan

28

Financial Plan	29
Important Assumptions	29
General Assumptions	29
Key Financial Indicators	29
Benchmark	30
Break-even Analysis	30
Income Statement (5 Year Projections)	31

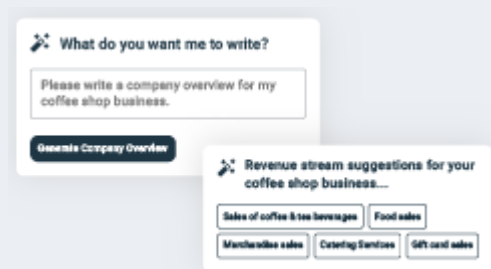
Balance Sheet (5 Year Projections) 33

Cash Flow Statement (5 Year projections) 35

Business planning that's simpler and faster than you think

Creating a business plan using Upmetrics to start and grow a business is literally the easiest thing in the World. Simply read the instructions and fill in the blanks. It's as simple as that.

Upmetrics has everything you need to create a comprehensive business plan.



AI-powered Upmetrics Assistant

AI-powered insights to streamline your plan

Not sure where to start? Upmetrics' AI Assistant will automatically generate ideas for each section of your plan and offer improved versions of your writing, adjusting for tone, voice, and grammar or spelling errors.

Financial Forecasting Tool

All the financials are calculated for you

Forget the complex formulas and clumsy spreadsheets — with automatic financials and drag-and-drop forecasting, you can finish your plan faster and be confident that your numbers are accurate.



Business Plan Builder

Guides you like a business mentor

Upmetrics' step-by-step instructions, prompts, and the library of 400+ sample business plans will guide you through each section of your plan as a business mentor.

Join over 110K entrepreneurs who trust **Upmetrics with Business Planning**

Create a comprehensive business plan and maximize your chances of securing funding, bank loans, and small business grants.

Create your business plan today

15-day money-back guarantee

1.

Executive Summary

Business Overview

Objectives

Management

Mission

Keys to Success

Financial Highlight

Business Overview

Eventel LLC

Welcome to the future of event planning! *Eventel*, *The event planning specialists* bring to the community of Portland a new breath of air in the event planning market. By combining old fashioned values, going the extra mile, and using cutting edge event-p

To unlock help try Upmetrics! 

Start writing here..

Objectives

Eventel LLC

Eventel is a small business aimed at the big time. In order to reach its lofty goals, *Eventel* must focus on the mission behind the vision. It will take all the employees, owners, founders, and vendors daily living the vision that Eventel represents. The vision man

To unlock help try Upmetrics! 

Start writing here..

Management



John Doe

Owner - john.doe@example.com

Eventel will be lead by John Doe. Throughout her life, Ceece has been a planner, and only recently has she truly discovered that she could leverage her passion and skill into a business opportunity. While Greece was pursuing her undergraduate and graduate degrees, she was a chairperson for no less than four different student organizations. After receiving her MBA, she went to work for IBM as a project manager. It was her six years at IBM pursuing project management that truly honed not only her planning/ project management skills but also her interpersonal skills. After her fifth year at IBM, Greece began to get a bit too complacent and began dreaming of leaving to begin her own business. At first, it was a struggle to figure out what she could do on her own. One day on a long bike ride she had an epiphany, realizing that she should begin her own event planning company.

Mission

Eventel LLC

In an ever-changing, fast-paced world, success is determined by good choices for lasting effects. Communication is essential. *Eventel* strives to be the best choice for clients by helping to ease their event planning burden. Through consistent, predictable p

To unlock help try Upmetrics!

Start writing here..

Keys to Success

Eventel LLC

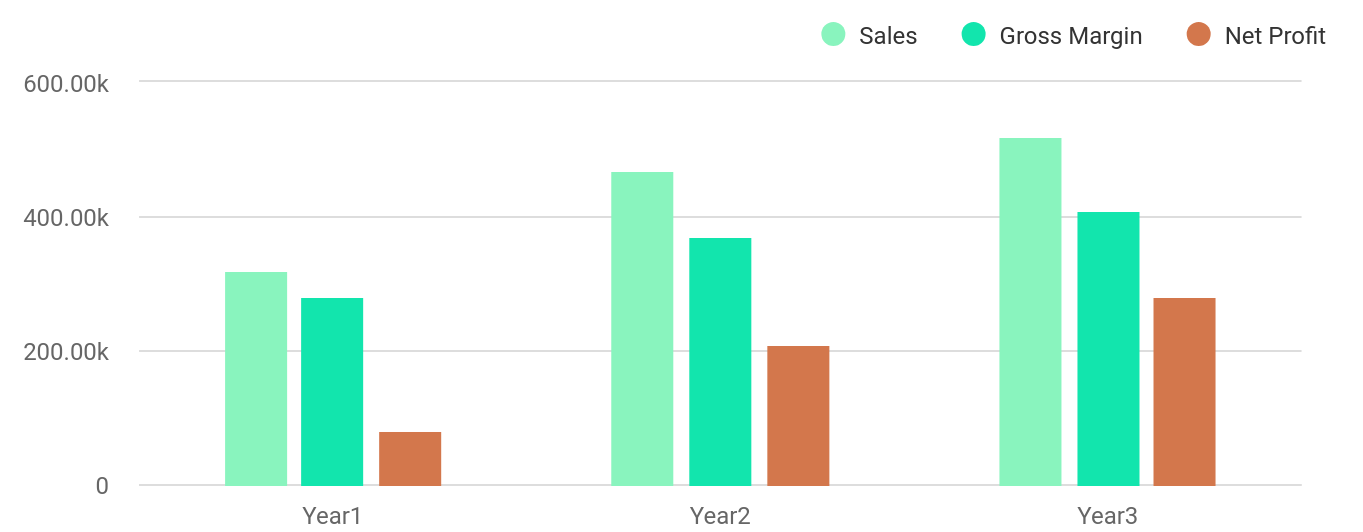
Our keys to success include the commitment to quality by every person who is part of the team. Each of us will be responsible to push ourselves to a higher level of professionalism in three areas:

To unlock help try Upmetrics!

Start writing here..

Financial Highlight

Net Income & Gross Margin



Financial Year	Sales	Gross Margin	Net Profit
Year1	320,000	280,000	80,000
Year2	470,000	370,000	210,000
Year3	520,000	410,000	280,000

2.

Business Summary

About Business

Business Ownership


Start-up Summary


Location

Office Design

About Business

Eventel LLC




To unlock help try Upmetrics! 

Start writing here..

Business Ownership

Eventel LLC

Eventel is established as a sole proprietorship with the intention of selling the business when it is established to one of the employees invested in the vision of event planning. All aspects of the business will be documented to ensure clients can count on the s


To unlock help try Upmetrics! 

Start writing here..

Start-up Summary

Eventel LLC

Through careful planning on the part of the founders, the startup costs for Eventel is minimal. It began as a home-based business with little overhead, and it continues to demand fewer outlay of funds as a service-based business. The start-up cost investment fu

To unlock help try Upmetrics! 

Start writing here..

Startup Expense

Start-up Expenses	
Legal	[Amount]
Stationery etc.	[Amount]
Brochures	[Amount]

Start-up Expenses	
Consultants	[Amount]
Insurance	[Amount]
Rent	[Amount]
Research and Development	[Amount]
Expensed Equipment	[Amount]
Other	[Amount]
Total Start-up Expenses	[Total Amount]

Start-up Assets

Start-up Assets Needed	
Cash Balance on Starting Date	[Amount]
Start-up Inventory	[Amount]
Other Current Assets	[Amount]
Total Current Assets	[Amount]
Long-term Assets	[Amount]
Total Assets	[Total Amount]
Total Requirements	

Funding

Funding	
Owner Contribution	
Other	
Total Investment	

Location

Eventel LLC

Eventel is located inside the city limits of Portland, Oregon. It is a home-based business. Most meetings with clients are conducted in social settings, such as restaurants, coffee houses, the client's home, facilities wishing to be used for the event, or over the phone.


To unlock help try Upmetrics!

Start writing here..

Office Design

Eventel LLC

The company will maintain a high degree of professionalism. All offices are equipped with the latest in business technology, such as telephone



To unlock help try Upmetrics!

Start writing here..

3.

Products and Services

Products and Services

Competitive Comparison

Products and Services

Eventel LLC

Although *Eventel* is primarily a service business, we also offer products to aid our customers in planning the event themselves. The following products are tools used inside our operation for the best possible results:

To unlock help try Upmetrics! 

Start writing here..

Eventel LLC

The Party Pack is a complete kit for any party. It includes decorations, lighting effects guide, disposable theme cameras, cutlery, plates, napkins, cups, punch mix (or recipe), snack supplies (or recipe), tablecloths, theme music (where applicable), invitations, the

To unlock help try Upmetrics! 

Party Pack

Start writing here..

Eventel LLC

These booklets include a calendar to map out the event, a step-by-step guide on what is needed for and how to put together a successful, worry-free event, resource information, popular refreshments with recipes, games, and tips to put their event in the re

To unlock help try Upmetrics! 

Step-by-Step Guides

Start writing here..

Eventel LLC

Due to be released in June 2000, this cutting-edge tool will allow the client all the resources and visual aids for their event planning. They will be able to play with decoration themes, listen to theme music, design invitations, thank-you cards, and RSVP cards, use

To unlock help try Upmetrics! 

Event Planning Software

Start writing here..

Eventel LLC

This valuable guide acts as a review for all the resources located in the surrounding area. A ranking is given to the various services, such as caterers, decorators, disc jockeys, bands, and facilities. This manual gives the client the freedom of making a choice

To unlock help try Upmetrics! 

Resources Manual

Start writing here..

Eventel LLC

As a member of the Portland community, it is our mission to support our community. Ten hours each month will be devoted to training area students in event planning. This will aid them in planning proms, graduation parties, river clean-ups, homecoming, and

To unlock help try Upmetrics! 

Event Planners Training Institute

Start writing here..

Competitive Comparison

Eventel LLC

Eventel, although young, draws from the age-old tradition of going above and beyond what is expected, every time. Our systems for event planning have been drawn up, evaluated, practiced, worked, and reworked to ensure maximum efficiency while minimizing

To unlock help try Upmetrics!

Start writing here..





SWOT Analysis



Market Size



Customer Process



Help tip

John & Sons

Depending on what details of your business you need different elements in your business plan. Here are some foundational elements...



Company Overview



What do you want me to write?

Please write a company overview for my coffee shop business.

Create Company Overview



Coffee Shop Business Plan

File Edit View Insert Format Tools Extensions Help

Summary

Outline



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.

Upmetrics guided builder prompts you with tailored questions and helps answer them to create your business plan. You also have access to AI Assistant and other resources to seek guidance and ensure you're on the right track.

Start your planning today

4.

Market Analysis

Market Segmentation

Customer Segmentation

Target Market Segment Strategy

Service Business Analysis

Eventel LLC

The following sections describe the market segmentation, strategies, and industry analysis.


To unlock help try Upmetrics! 

Start writing here..

Market Segmentation

Eventel LLC


The breakdown of the market for event planning falls in a wide, very diverse grouping. Individuals, as well as organizations, demand the services we provide. In order to provide the greatest depth of information, the market segments have been broken

To unlock help try Upmetrics! 

Start writing here..

Eventel LLC

Private organizations make up the single largest portion of *Eventel*' client base. Private organizations such as businesses, corporations, and political parties host the most events on the largest scales, therefore, these events generate larger revenues per


To unlock help try Upmetrics! 

Private Organizations and Businesses

Start writing here..

Eventel LLC

Government agencies host many events every year. *Eventel* hopes to alleviate the pressure of event planning for public employees. The second single largest segment, the public sector, can save money and give back to its community at the same time. These

To unlock help try Upmetrics! 

Public Organizations

Start writing here..

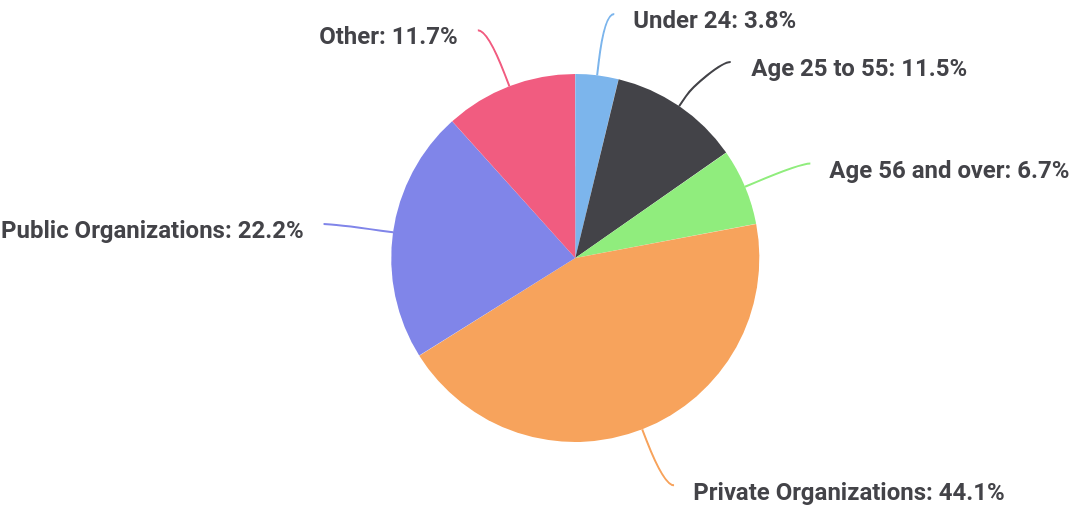
Under 24: Persons under the age of twenty-four (24) using an event planner are rare at best. We hope to tap the early college graduates who have begun their professional careers but have not yet started their families. These events will focus mainly on themes w

To unlock help try Upmetrics!

Age Breakdowns

Start writing here..

Customer Segmentation




Potential Customers	Growth	Year1	Year2	Year3	Year4	Year5	CAGR
Under 24							
Age 25 to 55							
Age 56 and over							
Private Organizations							
Public Organizations							

Potential Customers	Growth	Year1	Year2	Year3	Year4	Year5	CAGR
Other							
Total							

Target Market Segment Strategy

Eventel LLC

Our target markets are middle to upper-middle-class families, couples, individuals, or private and public organizations. We chose these groups because they are most able to afford event planners, and have the least amount of time to spare for event planning.

To unlock help try Upmetrics! 

Start writing here..

Service Business Analysis

Eventel LLC


Eventel is in a unique position of competition. We compete against hotels with conference facilities, conference centers, other event planners both on the large and small scale, persons within an organization who are assigned the task of organizing an event.

To unlock help try Upmetrics! 

Start writing here..

Eventel LLC

Strengths: On-site facilities, equipment, and support staff. Ability to transport and house persons for overnight stays. Able to internalize the costs of transportation and equipment.

To unlock help try Upmetrics! 

Hotels and Conference Centers

Start writing here..

Eventel LLC

Strengths: Have been in the market longer, have established a reputation and client base.

Weakness: Reputation precedes them, no systems-based businesses designed to produce

To unlock help try Upmetrics! 

Other Event Planners

Start writing here..

Eventel LLC

Strengths: Internalized cost of planning the event; able to add tiny personalized touches that have meaning within the group or family.

To unlock help try Upmetrics! 

Employees or Persons wishing to do it themselves

Start writing here..

5.

Marketing and Sales

Marketing and Competition

Sales Strategy

Sales Forecast

Marketing and Competition

Eventel LLC

We have discussed our client base as being predominately middle to upper-middle-class individuals, couples or families, public and private organizations. We must then look at the needs of these markets and cater to them. We promise the same great

To unlock help try Upmetrics! 

Start writing here..

Sales Strategy

Eventel deals with a diverse market of clients. Within each market segment, the closing of sales will differ. Each approach is described as follows:

Eventel LLC

Sales will be concluded one to two days after the end of the event. A follow-up phone call will be placed informing the client of the total cost, a number of attendees, and information about the billing packet that will arrive at their offices. Feedback forms will be


To unlock help try Upmetrics! 

Private and Public Organizations

Start writing here..

Eventel LLC

Sales will be concluded with a follow-up phone call one to two days after the event. The phone call will explain the total cost of the event, number of attendees, and information concerning the billing. Individual parties of any age group are placed on a billing c

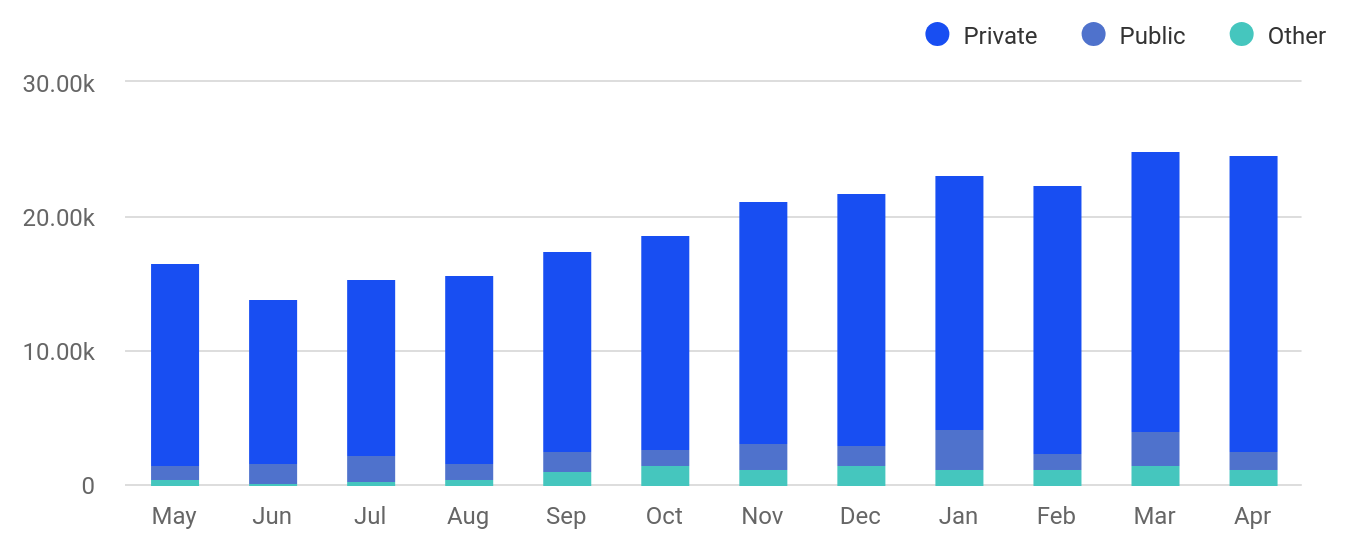
To unlock help try Upmetrics! 

Individuals

Start writing here..

Sales Forecast

Sales



By beginning on a smaller scale, Eventel has the foresight to grow at a rapid pace to keep up with demand. We wish to maintain a steady rate of sales growth; however, we understand that sales of products and services will vary in different months. As noted in the graph and chart, rapid increases during the holiday season will boost sales, then allow that growth to level off at a steady rate.

Sales	Year1	Year2	Year3
Private	\$206,170	\$276,099	\$299,002
Public	\$113,185	\$178,490	\$193,000
Other	\$33,794	\$40,081	\$62,777
Total Sales	\$353,149	\$494,670	\$554,779

Direct Cost of Sales:

Direct Cost of Sales	Year1	Year2	Year3
Private	\$312	\$330	\$355
Public	\$210	\$246	\$346
Other	\$132	\$151	\$189
Total	\$654	\$727	\$890

6.

Management and Operations

Management Summary

Organizational Structure

Personnel Plan

Management Summary

Eventel LLC

Information and expense details are presented in the subtopics Organizational Structure and Personnel Plan.

To unlock help try Upmetrics!

Start writing here..

Organizational Structure

Eventel LLC

The management team within *Eventel* will be small in the beginning. The primary employee is the founder, who plans events, then contracts with caterers, decorators, disc jockeys, and bands to fill out the event. A contract labor site manager will be on hand to w

To unlock help try Upmetrics!

Start writing here..

Personnel Plan

Personnel Plan	Year1	Year2	Year3
Event Specialist	\$36,000	\$40,000	\$42,000
Site Manager	\$11,097	\$13,750	\$14,560
Other	\$8,947	\$9,560	\$10,000
Total People	7	8	9
Total Payroll	\$56,044	\$63,310	\$66,560

7.

Financial Plan

Financial Plan

Important Assumptions

Key Financial Indicators

Break-even Analysis

Income Statement (5 Year Projections)

Balance Sheet (5 Year Projections)

Cash Flow Statement (5 Year projections)

Financial Plan

Eventel LLC

Service-based businesses require little funds to start up, and as they grow and expand, fewer funds to maintain. The charts and graphs that follow will show that investment up front allows *Eventel* to function debt-free with little overhead. This gives *Eventel* a

To unlock help try Upmetrics!

Start writing here..

Important Assumptions

Eventel LLC

Tax rates are noted for information. We carry no loan burden that would be affected by these rates. What hits *Eventel* the hardest (but not nearly are bad as other service businesses), is the tax rate of 23.5%, which is nearly one-quarter of the total sales. As *Eventel*

To unlock help try Upmetrics!

Start writing here..

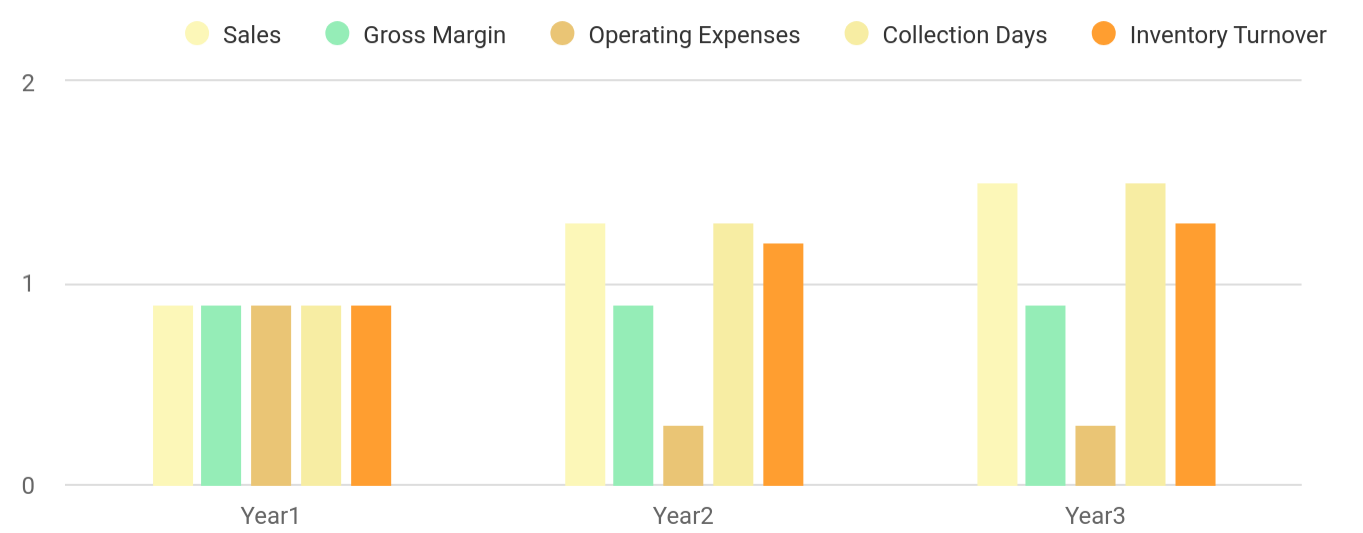
General Assumptions

General Assumptions	Year1	Year2	Year3
Plan Month	1	2	2
Current Interest Rate	8.92%	8.92%	8.92%
Long-term Interest Rate	7.99%	7.99%	7.99%
Tax Rate	24.04%	24.04%	24.04%
Sales on Credit %	60.00%	60.00%	60.00%
Other	0	0	0

Key Financial Indicators

The break-even point for Eventel is based on the assumption that we will produce 22 events per month and average approximately \$521 per event. In the current situation, we average more than this assumption for our public and private organization events. These currently make up 18 of the 22 average events hosted per month.

Benchmark



Break-even Analysis

The break-even point will appear more rapidly for Eventel than for other types of home-based businesses. Start-up costs are limited to minimal equipment, there is little or no staff to pay in the beginning, and contracted companies will handle any additional equipment required for the planned events.

Break-even Analysis	
Monthly Units Break-even	22
Monthly Revenue Break-even	\$11680
Assumptions	
Average Per-Unit Revenue	\$521.00
Average Per-Unit Variable Cost	\$75.00
Estimated Monthly Fixed Cost	\$10,000

Income Statement (5 Year Projections)

	2024	2025	2026
Revenue	\$666,289.59	\$1,147,120.18	\$2,006,077.58
Event Planning Services	\$318,500	\$572,180	\$1,027,120
Unit Sales	159	286	514
Unit Price	\$2,000	\$2,000	\$2,000
Event Management Workshops	\$212,830	\$303,375	\$432,515
Unit Sales	426	607	865
Unit Price	\$500	\$500	\$500
Online Event Planning Resources	\$134,959.59	\$271,565.18	\$546,442.58
Cost Of Sales	\$262,869.08	\$451,540.58	\$788,967.54
General Costs	\$262,869.08	\$451,540.58	\$788,967.54
Event Supplies	\$142,936.98	\$245,058.95	\$427,873.58
Decoration Materials	\$127,336.98	\$228,678.95	\$410,674.58
Audio-Visual Equipment Rental	\$15,600	\$16,380	\$17,199
Staffing Costs	\$119,932.10	\$206,481.63	\$361,093.96
Event Staff Wages	\$66,628.95	\$114,712.01	\$200,607.74
Contractor Fees	\$53,303.15	\$91,769.62	\$160,486.22
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$403,420.51	\$695,579.60	\$1,217,110.04
Gross Margin (%)	60.55%	60.64%	60.67%

	2024	2025	2026
Operating Expense	\$454,634.48	\$489,998.97	\$545,184.09
Payroll Expense (Indirect Labor)	\$375,120	\$385,261.56	\$395,688.84
Event Planning Team	\$142,560	\$145,987.20	\$149,500.32
Senior Event Planner	\$57,600	\$59,328	\$61,107.84
Event Coordinator	\$84,960	\$86,659.20	\$88,392.48
Administrative Staff	\$82,800	\$84,697.56	\$86,639.04
Office Manager	\$48,300	\$49,507.56	\$50,745.24
Administrative Assistant	\$34,500	\$35,190	\$35,893.80
Marketing and Sales Team	\$149,760	\$154,576.80	\$159,549.48
Marketing Manager	\$64,800	\$67,068	\$69,415.32
Sales Representative	\$84,960	\$87,508.80	\$90,134.16
General Expense	\$79,514.48	\$104,737.41	\$149,495.25
Office and Administrative Expenses	\$30,000	\$30,983.40	\$32,592.60
Office Rent	\$24,000	\$24,781.80	\$26,225.40
Utilities	\$6,000	\$6,201.60	\$6,367.20
Marketing and Advertising	\$42,914.48	\$67,052.01	\$110,096.85
Social Media Advertising	\$33,314.48	\$57,356.01	\$100,303.89
Print Advertising	\$9,600	\$9,696	\$9,792.96
Technology and Communication	\$6,600	\$6,702	\$6,805.80
Website Maintenance	\$3,600	\$3,672	\$3,745.44
Telephone and Internet	\$3,000	\$3,030	\$3,060.36
Bad Debt	\$0	\$0	\$0

	2024	2025	2026
Amortization of Current Assets	\$0	\$0	\$0
EBITDA	(\$51,213.98)	\$205,580.63	\$671,925.95
Additional Expense	\$12,296.42	\$11,174.62	\$9,971.75
Long Term Depreciation	\$9,288	\$9,288	\$9,288
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	(\$60,501.98)	\$196,292.63	\$662,637.95
Interest Expense	\$3,008.41	\$1,886.63	\$683.75
EBT	(\$63,510.40)	\$194,406.01	\$661,954.20
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$729,799.99	\$952,714.17	\$1,344,123.38
Net Income	(\$63,510.40)	\$194,406.01	\$661,954.20
Net Income (%)	(9.53%)	16.95%	33%
Retained Earning Opening	\$0	(\$81,510.40)	\$104,895.61
Owner's Distribution	\$18,000	\$8,000	\$8,000
Retained Earning Closing	(\$81,510.40)	\$104,895.61	\$758,849.81

Balance Sheet (5 Year Projections)

	2024	2025	2026
Assets	(\$17,028.18)	\$152,738.25	\$788,849.81

	2024	2025	2026
Current Assets	(\$52,740.18)	\$126,314.25	\$771,713.81
Cash	(\$52,740.18)	\$126,314.25	\$771,713.81
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$35,712	\$26,424	\$17,136
Gross Long Term Assets	\$45,000	\$45,000	\$45,000
Accumulated Depreciation	(\$9,288)	(\$18,576)	(\$27,864)
Liabilities & Equity	(\$17,028.19)	\$152,738.25	\$788,849.81
Liabilities	\$34,482.21	\$17,842.64	\$0
Current Liabilities	\$16,639.57	\$17,842.64	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$16,639.57	\$17,842.64	\$0
Long Term Liabilities	\$17,842.64	\$0	\$0
Long Term Debt	\$17,842.64	\$0	\$0
Equity	(\$51,510.40)	\$134,895.61	\$788,849.81
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$30,000	\$30,000	\$30,000
Retained Earnings	(\$81,510.40)	\$104,895.61	\$758,849.81

	2024	2025	2026
Check	\$0	\$0	\$0

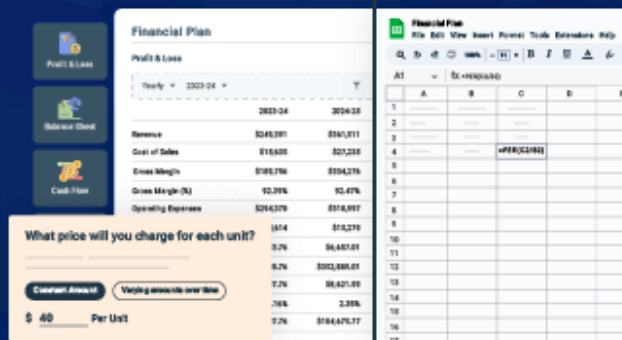
Cash Flow Statement (5 Year projections)

	2024	2025	2026
Cash Received	\$666,289.59	\$1,147,120.18	\$2,006,077.58
Cash Paid	\$720,511.99	\$943,426.17	\$1,334,835.38
COS & General Expenses	\$342,383.57	\$556,277.99	\$938,462.79
Salary & Wages	\$375,120	\$385,261.56	\$395,688.84
Interest	\$3,008.41	\$1,886.63	\$683.75
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	(\$54,222.40)	\$203,694.01	\$671,242.20
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$45,000	\$0	\$0
Net Cash From Investments	(\$45,000)	\$0	\$0
Amount Received	\$80,000	\$0	\$0
Loan Received	\$50,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$30,000	\$0	\$0
Amount Paid	\$33,517.78	\$24,639.58	\$25,842.64
Loan Capital	\$15,517.79	\$16,639.57	\$17,842.64

	2024	2025	2026
Dividends & Distributions	\$18,000	\$8,000	\$8,000
Net Cash From Financing	\$46,482.22	(\$24,639.58)	(\$25,842.64)
Summary			
Starting Cash	\$0	(\$52,740.18)	\$126,314.25
Cash In	\$746,289.59	\$1,147,120.18	\$2,006,077.58
Cash Out	\$799,029.77	\$968,065.75	\$1,360,678.02
Change in Cash	(\$52,740.18)	\$179,054.43	\$645,399.56
Ending Cash	(\$52,740.18)	\$126,314.25	\$771,713.81

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.



Upmetrics could be your way out of boring & clumsy spreadsheets. Simply enter the numbers, and get accurate and easy-to-understand financial reports made in minutes - no more remembering complex formulas or fussing in the spreadsheet.

[Start your planning today](#)

Create a winning business plan that gets you funded

Creating a stunning and investment-ready plan requires no writing, graphic designing, or financial planning expertise.

Upmetrics has all the features required to help you create a comprehensive business plan—from start to finish. Make no mistakes, it's the modern way of planning to structure ideas, make plans, and create stunning pitch decks to awe investors.

Pitch decks that impress investors

Create pitch decks that provide a visual representation of your business, engage investors, and make them want to invest in your business idea.

Stunning cover page designs

With Upmetrics, you have the liberty to choose from multiple stunning cover page designs. Choose a creative design and make your plan stand out.

Online sharing made simple

Upmetrics makes online sharing quick and easier for users. Easily share your business plans with a link while tracking reader activity.

Interactive plans in no time

Import business plan sections like—SWOT analysis, comparison tables, and others to create an interactive business plan. No designing skills are required.

500+ sample business plans

Simply import a template from our library of sample plans into the editor and start customizing it to make it yours. It takes only a few clicks to get started.

Collaborate with team in real-time

Invite team members, initiate conversations, discuss ideas & strategies, share feedback, and work on a business plan in real-time.



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.**

Create winning Business Plans with our

AI Business Plan Platform

Get Started Today!

15-day money-back guarantee

