



Trucking Company

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Business Plan

[YEAR]

Prepared By

John Doe



A great moving experience.

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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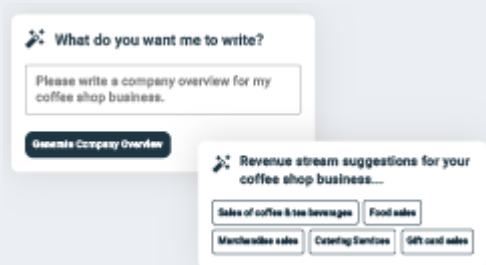
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1.

Executive Summary

Products Served

Customer Focus

Mission Statement

Vision Statement

Success Factors

Financial Summary



REMEMBER

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

To unlock help try Upmetrics!

Maxwell Truck Service

Maxwell Truck Service Inc. is a trucking company that will be based in Detroit - Michigan.

We will provide daily freight services (trucking services, moving services & supplies and bulk

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Products Served

Maxwell Truck Service

Maxwell Truck Service Will be able to provide local and long-distance transportation services:

- General Freight

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Customer Focus

Maxwell Truck Service

Maxwell Truck Service will primarily serve manufacturers and distributors within the U.S. The demographics of these customers are as follows:

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Mission Statement

Maxwell Truck Service

Our mission is to ensure that we build a trucking company that will operate in the whole of the United States of America and Canada; a company that will boast of having some of the best and reliable truck drivers in the whole of the United States of America

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Vision Statement

Maxwell Truck Service

Our Vision is to become one of the preferred choices of individuals and organizations when it comes to the demand for trucking services in the whole of the United States of America.

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Success Factors

Maxwell Truck Service

Maxwell Truck Service is uniquely qualified to succeed for the following reasons:

- Maxwell Truck Service will fill a specific market niche in the growing manufacturing and

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Financial Summary

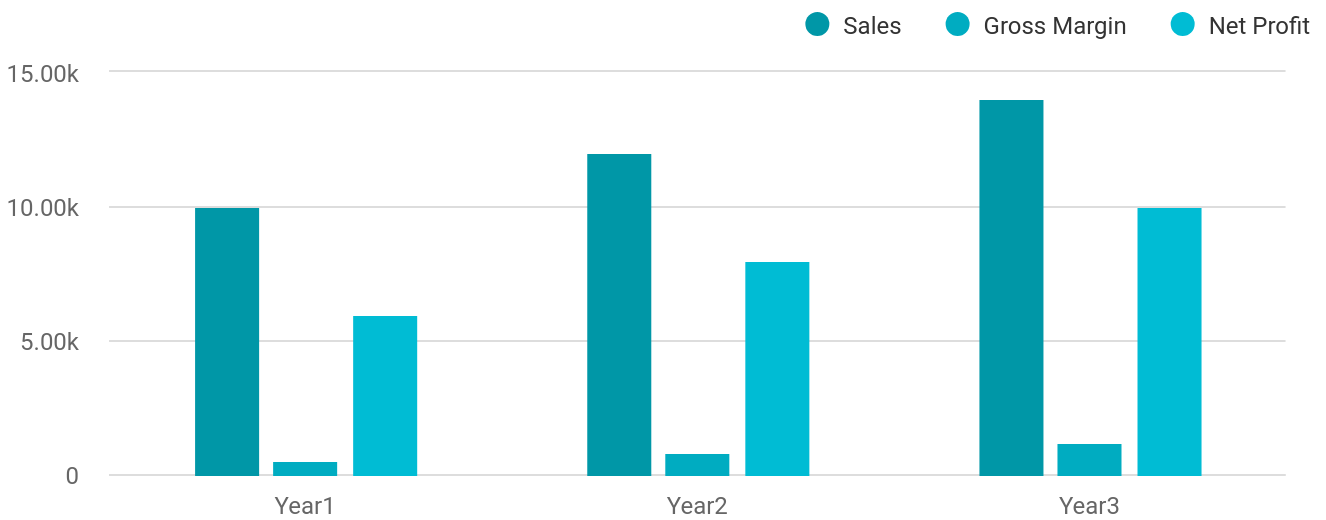
Maxwell Truck Service

Maxwell Truck Services seeking total funding of \$230,000 of debt capital to open its trucking business. The capital will be used for funding capital expenditures and location build-out, hiring initial employees, marketing expenses, and working capital.

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3 Year profit forecast



Maxwell Truck Service

Financial Summary

Year 1

Year 2

Year 3

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2.

Company Summary

History

Business Structure

Startup summary

Maxwell Truck Service

Maxwell Truck Service Inc. is a family business; it is owned by John Moore and family. John Moore is an investor who has an interest in the trucking industry. The company will be fully financed by John Moore and he will be the founding chief operating officer.


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History

Maxwell Truck Service

As the number of businesses grows in the U.S., the need for a reliable transportation vehicle also increases. In 2015, John Moore decided to meet this market need by investing in a small fleet of trucks to provide transportation services to small businesses.


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Business Structure

Maxwell Truck Service

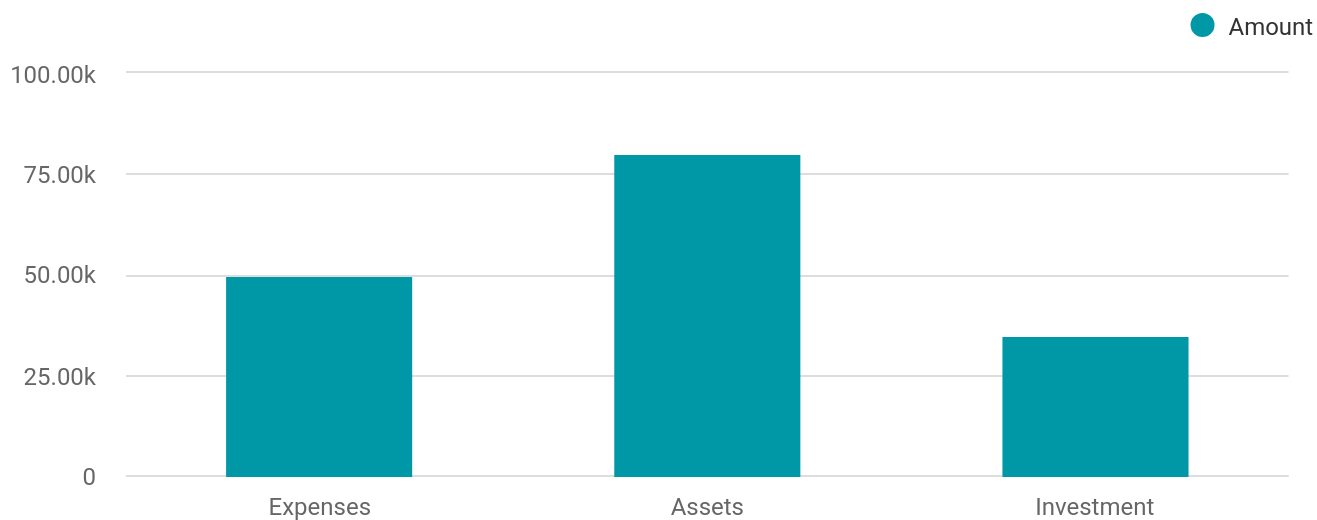
Our business structure will be designed in such a way that it can accommodate but full-time employees and part-time / contract staff; those who just want to take some time off to generate additional incomes.

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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

3.

Products and services

Maxwell Truck Service

Maxwell Truck Service Inc. is a company that looks forward to delivering excellent services in terms of helping our customers move goods and equipment from one destination to another destination. We want to be known as the trucking company that truly

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General Freight



Refrigerated Freight



Dry Bulk Freight



Bulk Liquids



Moving supplies



All furniture quilt-wrapped for protection



On-time pickup and delivery



Home and office movement



Local and long distance movement



Heavy duty equipment movement



Excavators movement



Bulldozers movement



Construction equipment movement



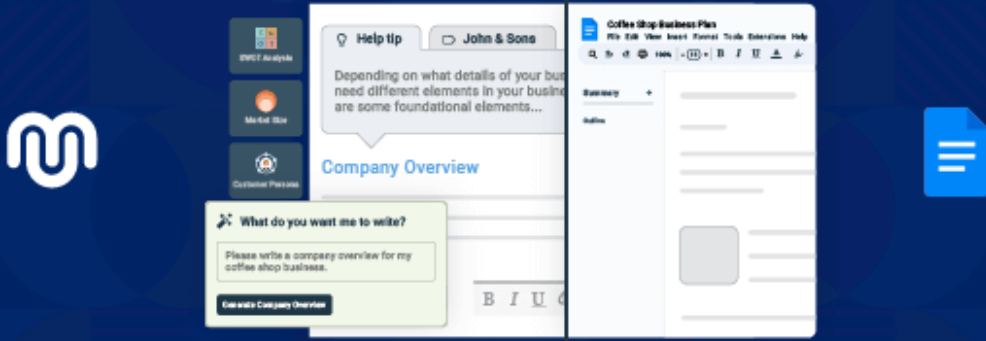
Agricultural equipment movement



Movement of oil and gas products

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4.

Market Analysis

Market Trends

Market Segmentation

Target Market Segment Strategy



REMEMBER

The most important component of an effective Trucking 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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Market Trends

Maxwell Truck Service

The market trends as it involves the trucking industry especially in the United States and Canada are indeed dynamic and at the same challenging. But one thing is certain, once a trucking company can gain credibility, it will be much easier for the co

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Market Segmentation

Maxwell Truck Service

There are several potential customer segments that we will provide our transportation services to. Major customer segments include the food industry, PC, and semiconductor manufacturers, and retailers. The chart and table below outline the current market siz

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Target Market Segment Strategy

Maxwell Truck Service

Maxwell Truck Service will focus its marketing budget on a selected industry niche. A narrow-served market focus will help strengthen the company's reputation as a reliable transportation services provider and will generate favorable referrals.

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5.

SWOT Analysis

Maxwell Truck Service

Going by our vision, our mission, and the kind of business we want to set – up, we don't have any other option than to follow due process. Following due process involves hiring business a consultant to help us conduct a SWOT analysis and prepare a trucking

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Strength

Our areas of strength in the U.S include; size advantages, cost advantages, supply chain, customer loyalty, and strong reputation amongst domestic industry players.

Weakness

Our weakness could be lack of finance, high debt burden, cost structure, lack of scale compared to our peers who have already gained ground in the industry.

Opportunity

The opportunities that are available to us as a trucking company in the United States are the online market, new services, new technology, and of course the opening of new markets.

Threat

Some of the threats that we are likely going to face are mature markets, a bad economy (economy downturn), stiff competition, volatile costs, and rising fuel prices.

6.

Strategy & Implementations

Sales Plan

Advertising 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 Plan

Maxwell Truck Service

At the time of this writing, Maxwell Truck Service has a lease arrangement with various companies. The company's pricing is based on miles per thousands of pounds of cargo transported. We will be able to charge competitive rates, as we have

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Advertising Strategy

Maxwell Truck Service

Maxwell Truck Service Expects its target market to be individuals working and/or living within Michigan. Maxwell Truck Service promotions strategy to reach these individuals includes:

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Start writing here..

Maxwell Truck Service

Maxwell Truck Service will announce its product launching several weeks in advance through publicity pieces in multiple newspapers and publications. Regular advertisements will run to maintain exposure to relevant markets.

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Publications

Start writing here..

Maxwell Truck Service

We will drive attention toward Maxwell Truck Service By renting billboard ad spaces along routes or highways that hold heavy traffic. Advertising on heavily traveled commute routes is an opportunity to alert large numbers of businesses of our opening.


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Commuter Advertising

Start writing here..

Maxwell Truck Service

Maxwell Truck Service will create an aggressive client referral program that gives discounts to existing clients for every successful referral.

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Client Referral Programs

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Maxwell Truck Service

Maxwell Truck Service will blanket businesses with direct mail pieces. These pieces will provide general information on Maxwell Truck Service, offer discounts, and/or provide other enticements for people to use our services.


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Direct Mail

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Maxwell Truck Service

Maxwell Truck Service will maintain a website and publish an update on ongoing promotions, discounts, and new feature upgrades on our fleet of trucks. It will invest resources in two forms of geographically-focused internet promotion organic search engine c

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Online Marketing

Start writing here..

7.

Operations Plan

Locations & Facilities

Milestones & Metrics

Locations & Facilities

Maxwell Truck Service

Our company will offer both for-hire trucking as well as private carriers. Most of their business will be derived from private carriers. For the private carrier segment, both truckload (TL) and less than truckload (LTL) will be offered. Our company's services will

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Milestones & Metrics

Maxwell Truck Service

Key Metrics

- Freight cost per unit shipped

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8.

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 Trucking 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 Truck Service

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 Trucking 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	\$2,261,700.69	\$3,866,441.96	\$6,758,753.34
Long-Distance Freight Services	\$1,910,080	\$3,430,400	\$6,161,000
Unit Sales	955	1,715	3,081
Unit Price	\$2,000	\$2,000	\$2,000
Local Delivery Services	\$226,491	\$287,515.50	\$409,951.50
Unit Sales	1,510	1,917	2,733
Unit Price	\$150	\$150	\$150
Leasing of Trucks	\$125,129.69	\$148,526.46	\$187,801.84
Cost Of Sales	\$385,608.69	\$667,848.98	\$1,178,018.15
General Costs	\$385,608.69	\$667,848.98	\$1,178,018.15
Fuel and Maintenance Costs	\$30,596.25	\$46,189.42	\$62,823.82
Diesel Fuel	\$13,485.17	\$19,246.29	\$24,409.30
Truck Maintenance	\$17,111.08	\$26,943.13	\$38,414.52
Driver and Staff Related Costs	\$355,012.44	\$621,659.56	\$1,115,194.33
Driver Salaries	\$322,738.58	\$565,145.06	\$1,013,813.01
Staff Welfare	\$32,273.86	\$56,514.50	\$101,381.32
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$1,876,092	\$3,198,592.98	\$5,580,735.19
Gross Margin (%)	82.95%	82.73%	82.57%

	2024	2025	2026
Operating Expense	\$1,454,508.51	\$1,547,561.36	\$1,678,939.13
Payroll Expense (Indirect Labor)	\$1,323,000	\$1,357,815.60	\$1,393,600.32
Driving Staff	\$741,000	\$761,070	\$781,699.20
Truck Drivers	\$525,000	\$540,750	\$556,972.80
Delivery Coordinators	\$216,000	\$220,320	\$224,726.40
Office Staff	\$380,640	\$388,252.80	\$396,017.88
Administrative Assistants	\$175,680	\$179,193.60	\$182,777.40
Customer Service Representatives	\$204,960	\$209,059.20	\$213,240.48
Management	\$201,360	\$208,492.80	\$215,883.24
Operations Manager	\$109,200	\$113,568	\$118,110.72
HR Manager	\$92,160	\$94,924.80	\$97,772.52
General Expense	\$131,508.51	\$189,745.76	\$285,338.81
Vehicle and Equipment	\$26,252.79	\$35,673.36	\$43,757.65
Truck Repairs	\$20,227.79	\$28,869.36	\$36,613.45
Equipment Upgrades	\$6,025	\$6,804	\$7,144.20
Administrative Costs	\$27,804.70	\$28,287.13	\$28,830.73
Office Rent	\$24,000	\$24,000	\$24,000
Utilities	\$3,804.70	\$4,287.13	\$4,830.73
Marketing and Advertising	\$77,451.02	\$125,785.27	\$212,750.43
Digital Marketing	\$67,851.02	\$115,993.27	\$202,762.59
Print Advertising	\$9,600	\$9,792	\$9,987.84
Bad Debt	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0

	2024	2025	2026
EBITDA	\$421,583.49	\$1,651,031.62	\$3,901,796.06
Additional Expense	\$60,919.42	\$58,106.63	\$55,120.32
Long Term Depreciation	\$50,160	\$50,160	\$50,160
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	\$371,423.49	\$1,600,871.62	\$3,851,636.06
Interest Expense	\$10,759.42	\$7,946.62	\$4,960.34
EBT	\$360,664.07	\$1,592,924.99	\$3,846,675.74
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$1,901,036.62	\$2,273,516.97	\$2,912,077.60
Net Income	\$360,664.07	\$1,592,924.99	\$3,846,675.74
Net Income (%)	15.95%	41.20%	56.91%
Retained Earning Opening	\$0	\$342,664.07	\$1,927,589.06
Owner's Distribution	\$18,000	\$8,000	\$8,000
Retained Earning Closing	\$342,664.07	\$1,927,589.06	\$5,766,264.80

Projected Cash Flow

	2024	2025	2026
Cash Received	\$2,261,700.69	\$3,866,441.96	\$6,758,753.34
Cash Paid	\$1,850,876.62	\$2,223,356.97	\$2,861,917.60

	2024	2025	2026
COS & General Expenses	\$517,117.20	\$857,594.74	\$1,463,356.96
Salary & Wages	\$1,323,000	\$1,357,815.60	\$1,393,600.32
Interest	\$10,759.42	\$7,946.62	\$4,960.34
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	\$410,824.07	\$1,643,084.99	\$3,896,835.74
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$500,000	\$0	\$0
Net Cash From Investments	(\$500,000)	\$0	\$0
Amount Received	\$250,000	\$0	\$0
Loan Received	\$200,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$50,000	\$0	\$0
Amount Paid	\$63,604.70	\$56,417.49	\$59,403.80
Loan Capital	\$45,604.70	\$48,417.50	\$51,403.78
Dividends & Distributions	\$18,000	\$8,000	\$8,000
Net Cash From Financing	\$186,395.30	(\$56,417.49)	(\$59,403.80)
Summary			
Starting Cash	\$0	\$97,219.37	\$1,683,886.87
Cash In	\$2,511,700.69	\$3,866,441.96	\$6,758,753.34

	2024	2025	2026
Cash Out	\$2,414,481.32	\$2,279,774.46	\$2,921,321.40
Change in Cash	\$97,219.37	\$1,586,667.50	\$3,837,431.94
Ending Cash	\$97,219.37	\$1,683,886.87	\$5,521,318.81

Projected Balance Sheet

	2024	2025	2026
Assets	\$547,059.37	\$2,083,566.87	\$5,870,838.81
Current Assets	\$97,219.37	\$1,683,886.87	\$5,521,318.81
Cash	\$97,219.37	\$1,683,886.87	\$5,521,318.81
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$449,840	\$399,680	\$349,520
Gross Long Term Assets	\$500,000	\$500,000	\$500,000
Accumulated Depreciation	(\$50,160)	(\$100,320)	(\$150,480)
Liabilities & Equity	\$547,059.38	\$2,083,566.87	\$5,870,838.83
Liabilities	\$154,395.31	\$105,977.81	\$54,574.03
Current Liabilities	\$48,417.50	\$51,403.78	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$48,417.50	\$51,403.78	\$0
Long Term Liabilities	\$105,977.81	\$54,574.03	\$54,574.03
Long Term Debt	\$105,977.81	\$54,574.03	\$54,574.03

	2024	2025	2026
Equity	\$392,664.07	\$1,977,589.06	\$5,816,264.80
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	\$342,664.07	\$1,927,589.06	\$5,766,264.80
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%
Gross Margin	94,18%	93,85%	93,52%	0,00%

	Year 1	Year 2	Year 3	Industry Profile
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.
Current Debt/Total Assets	4%	3%	2%	N.A.

	Year 1	Year 2	Year 3	Industry Profile
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.

The image shows two side-by-side views of financial planning. On the left is the Upmetrics interface, which is clean and user-friendly. It features a 'Financial Plan' section with a 'Profit & Loss' table comparing 2023-24 and 2024-25. Below the table is a calculator for unit pricing, with a 'Constant Assum.' button and a 'Varying amounts over time' button. On the right is a standard spreadsheet view of the same data, showing a grid with formulas like '=PER(C2:B2)' and a green document icon.

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

