



BUSINESS PLAN [YEAR]



Liquor Store

A Moments of Chilling.



John Doe



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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 Liquor Store service, you must create a detailed Liquor Store 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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TIP

Maxwell Liquor Store is a neighborhood liquor store that will be located in a centralized area between a residential neighborhood and a busy business district in Detroit, Michigan. We are aware that online in most states in the U.S Michigan is one of the states that allows individuals to operate a liquor store and also sell other alcoholic drinks which is why we

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Mission Statement



TIP

Our mission is to establish a liquor store business that will make available a wide range of liquors, wines, and beers from top brands at affordable prices to the residence of Detroit – Michigan, and other cities in the United States of America and Canada where we intend opening our outlets and selling our franchise.

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Vision Statement



TIP

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

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Customer Focus



TIP

Maxwell Liquor Store will primarily serve the residents, aged 21 and older who live within a 10- mile radius of our store. The demographics of these customers are as follows:

- 416,000 residents

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Success Factors



TIP

Maxwell Liquor Store is uniquely qualified to succeed for the following reasons:

- There is currently no quality liquor store in the community we are entering. In addition, we have surveyed the local community and received extremely positive feedback saying that they

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Financial Summary



TIP

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

- Store design/build: \$165,000

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3 Year profit forecast



TIP

Financial Summary	Year 1	Year 2	Year 3
Revenue	\$965,742	\$1,878,611	\$2,718,300

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2.

Company Summary

History

Business Structure

Store Design

Startup summary



TIP

Maxwell Liquor Store is owned by Mr. John Moore who has successfully managed several bars and nightclubs in Los Angeles and Las Vegas prior to opening his own liquor store. It is a family business that will be managed alongside his immediate family member.

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History



TIP

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

John Moore has selected three initial locations and is currently undergoing due diligence on each property and the local market to a

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Business Structure



TIP

Maxwell Liquor Store does not intend to start a liquor retailing business like the usual mom and pop business around the street corner; our intention of starting a liquor retail business is to build a standard liquor store that will be a one-stop-shop for liquors, beers, and wines which is why we will ensure that we put the right structure in place that will support the kind of g

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Store Design



TIP

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

- Main store

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Startup summary

Startup cost



Cost distribution

Amount

Expenses	50000
Assets	80000
Investment	35000

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
Long-term Assets	\$125,000

Start-up Expenses	Amount
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
Loss at Start-up (Start-up Expenses)	\$313,125
TOTAL CAPITAL	\$221,875

Start-up Expenses	Amount
TOTAL CAPITAL AND LIABILITIES	\$221,875
Total Funding	\$265,000

3.

Products and services



TIP

Maxwell Liquor Store is going to operate a standard and licensed neighborhood liquor store that will retail a wide range of liquors, beers, and wines just like any other licensed and standard liquor store in the United States and in any part of the world.

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Liquors



Beers

Bud Light, Coors Light, Miller Lite, Budweiser, Michelob Ultra-Light, Natural Light, Busch Light, Bush, Redd's Apple Ale, Sierra Nevada Pale Ale, Keystone Light, Pabst Blue Ribbon, Bud Light Lime, Bud Light Platinum Lager etc.



Locally Crafted Beers

Pale Beers, Amber Beers, Dark Beers, Hebrew Beers, Gluten Free, Organic Brews, Cider etc



Wines



Distilled spirits



Martinis



Non – alcoholic beverages



Tobacco

4.

Market Analysis

Industry Analysis

Market Segmentation

Market Needs



REMEMBER

The most important component of an effective Liquor Store services 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 this Liquor Store business plan sample or other Liquor Store services business plans available online.

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Industry Analysis



TIP

In the United States of America, most of the states have strict control on liquor stores hence it is not easy to secure a license to open one. In Michigan and in few states in the U.S, individuals can actually open their own liquor retail store and it is the practice for them to sell loads of assorted alcoholic drinks, and not only liquors; they are known to retail liquors, wines,

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Market Segmentation



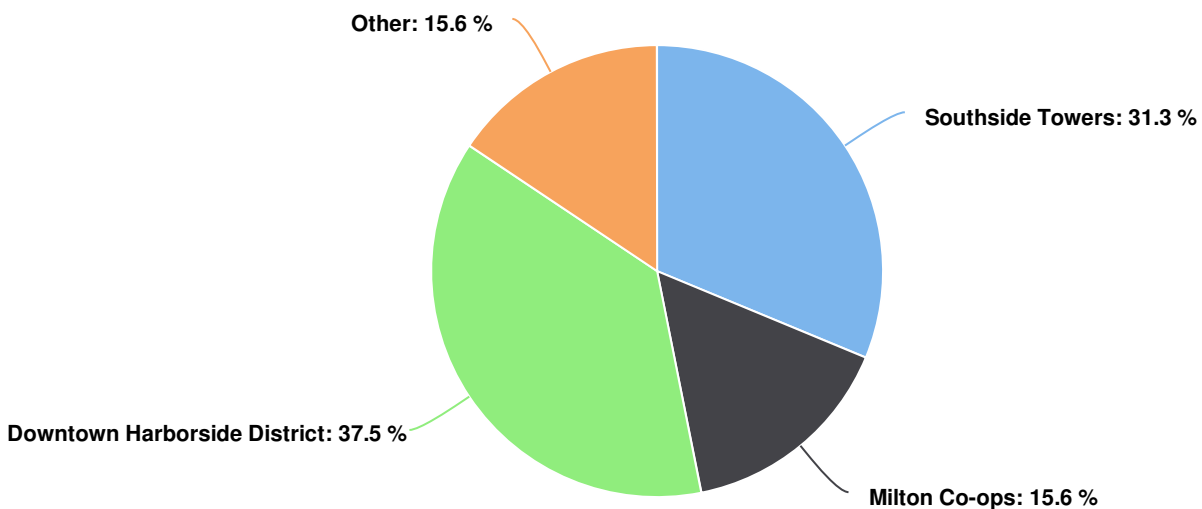
TIP

The following chart and table show the market analysis for Maxwell Liquor Store.



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TIP

	Growth	Year1	Year2	Year3	CAGR
Southside Towers	0%	3,000	5,000	7,000	38.38%

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Market Needs



TIP

Other than the market segment carved out by Beverson's and a handful of major players, little attention is paid to the opportunities of geographic extensions through direct shipments of wine & spirits throughout Massachusetts. Severson's markets over the Internet and has over 220 thousand actual and potential customers on its mail

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5.

SWOT Analysis



TIP

Our intention of starting just one outlet of our liquor retail store in Detroit – Michigan is to test run the business for a period of 2 to 5 years to know if we will invest more money, expand the business and then open other outlets all over Michigan and also sell franchise through the United States of America and Canada.

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Strengths

Our location, the business model we will be operating on (a physical store and online liquor store), varieties of payment options, a wide range of liquors, wines, and beers (locally crafted beer inclusive), and our excellent customer service culture will definitely count as a strong strength for Maxwell Liquor Store.

S

Weaknesses

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

W

Opportunities

The fact that we are going to be operating our liquor retail store in one of the busiest districts in Detroit – Michigan provides us with unlimited opportunities to sell our liquors, wines, and beers to a large number of people.

We have been able to conduct thorough feasibility studies and market surveys and we know what our potential clients will be looking for when they visit our liquor retail store; we are well-positioned to take on the opportunities that will come our way.

O

Threats

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 liquor retail outlet in the same location where ours is located or even the arrival of a nightclub and bar.

T

6.

Strategy & Implementations

Sales Strategy

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, sales strategy is also an important component of a Liquor Store service business startup and must be properly planned before you think about starting your business.

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Sales Strategy



TIP

Management will focus on daily sales revenue goals.

Best value products will be identified to assist customers with smart selections.

Deliveries will be geared to the customer's convenience.

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Advertising Strategy



TIP

Maxwell Liquor Store 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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TIP

Maxwell Liquor Store 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

Start writing here...



TIP

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 Liquor Store.

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Public Relations

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TIP

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

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Advertising

Start writing here...



TIP

Maxwell Liquor Store 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

Start writing here...



TIP

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

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Pre-Opening Events

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Pricing Strategy



TIP

Pricing is one of the key factors that give leverage to liquor retail stores, it is normal for consumers to go to places (liquor retail outlets) where they can get liquors, wine and beers et al at a cheaper price which is why big player in the liquor, wine, and beer retail industry like attract loads of consumers

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7.

Management Summary

Management Team

Personnel Plan



TIP

Maxwell Liquor Store will be managed by John Moore and James Moore. After the launch of the business, as sales volumes increase, an associate manager may be hired to help with day-to-day store operations.

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Management Team



JOHN MOORE

Managing Partner

John has over 25 years of management experience in retail, financial services, and newspaper publishing businesses. After graduating with a B.A. from Bigten State University in 1981, John worked his way up the career ladder in retail management positions for Jensen's, Hollard's, and Northbank. In 1986, he became an assistant vice president with Hanson Trust. In 1988, he launched his first business, Atlantic Racquet Club. As the CEO of the organization, he learned, first hand, everything it takes to start and operate a small retail business in a major city. In the 1990s, John worked as a newspaper executive, first for the Metropolis Star and later for the Gotham City Times, whereas director of business operations he was a key member of the management team that launched and grew the gothamcitytimes.com website.

John holds an MBA degree in finance and accounting from Burke University, a B.A. in psychology from Bigten State University, and a Higher Certificate degree from the Wine and Spirit Education Trust.



ROBERT MOORE

Managing Partner

James brings over 20 years of wine trade expertise and executive management skills to our company. For the last ten years, James served as the director of food and beverages for the Prestige Athletic Club, an \$8 million/year operation where he personally selected the club's wine list (of over 100 wines), coordinated over 20 wine tastings, taught wine classes, and developed relationships with some of the top winemakers in the world. As a volume buyer for the PAC, he has done business with many of the wine and liquor distributors and importers who cover the metro New York area.

Prior to his position at the PAC, James spent more than a dozen years in restaurant management positions—as restaurant manager of Mr. E's in Houston, Partner and general manager of the Fieldstone Restaurant in Minneapolis, and restaurant manager for the Pinnacle Hotel in Boston.

After graduating from Telford University in 1983 with a B.A. degree in history, James earned a Higher Certificate with Distinction from the Wine and Spirit Education Trust, and a Certified Sommelier degree from the Sommelier Society of America.

Personnel Plan



TIP

The following table shows the personnel needed for Maxwell Liquor Store.

Personnel Plan	Year1	Year2	Year3
Store Managers/Partners	\$96,000		

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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 Liquor Store service 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 the earned profits. It is recommended that you use [our financial planning tool](#) for guiding you through all financial aspects needed to be considered.

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TIP

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 Liquor Store service business start-up, no equity funding or outside loans will be required. With the help of financial experts, John has developed the following financial plan for his start-up business, which outlines the financial

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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

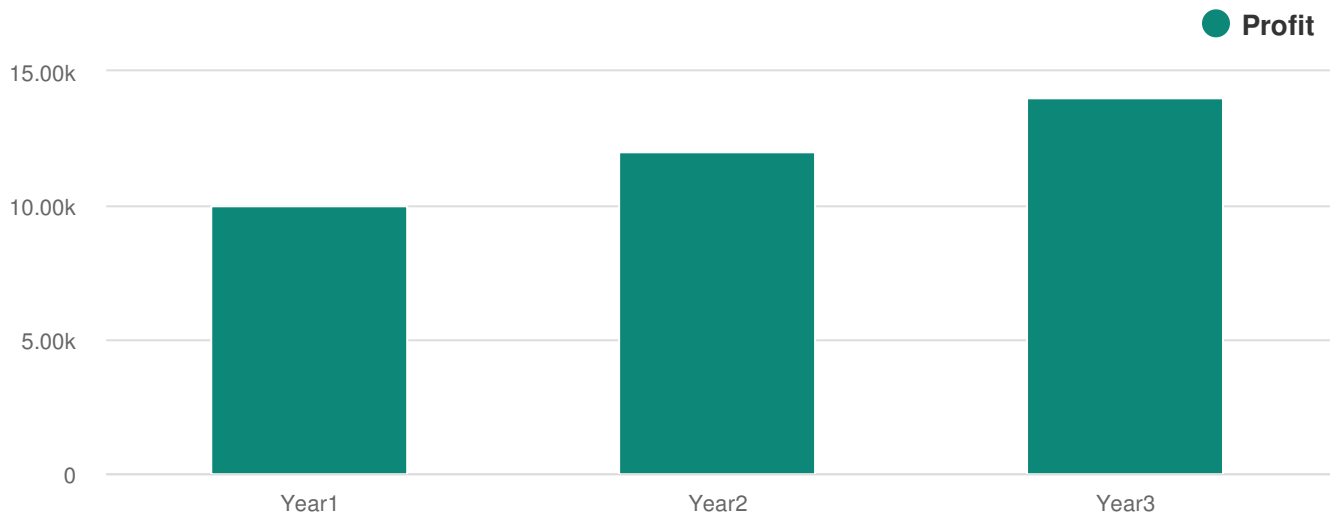
Brake-even Analysis

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

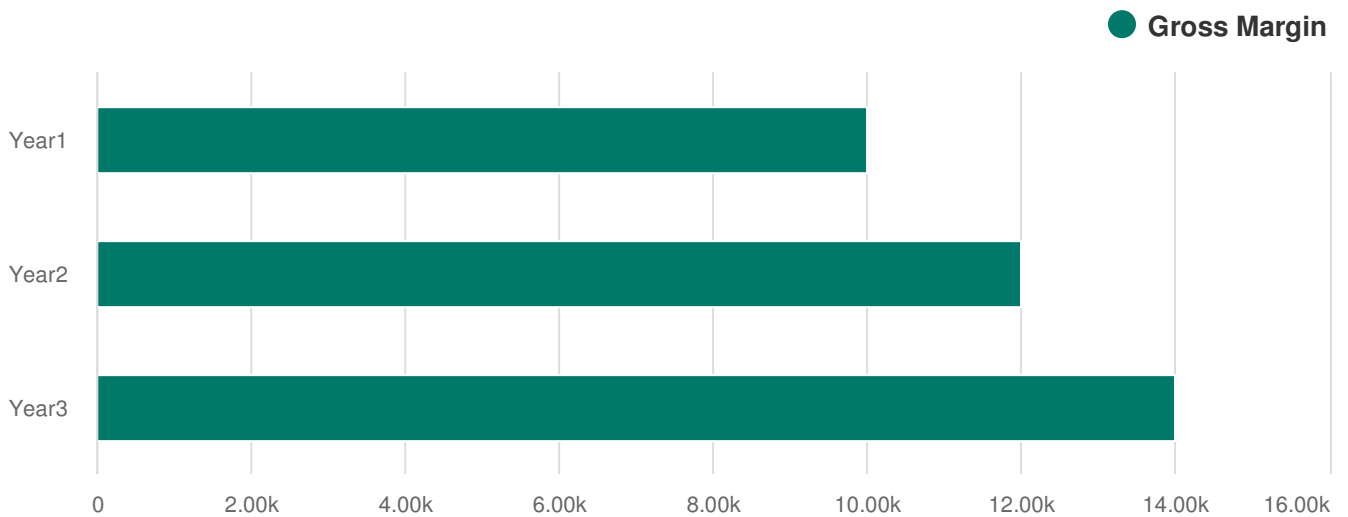
	Year 1	Year 2	Year 3
Sales	\$309 069	\$385 934	\$462 799
Direct Cost of Sales	\$15 100	\$19 153	\$23 206
Other	\$0	\$0	\$0
TOTAL COST OF SALES	\$15 100	\$19 153	\$23 206
Gross Margin	\$293 969	\$366 781	\$439 593
Gross Margin %	94,98%	94,72%	94,46%
Expenses			
Payroll	\$138 036	\$162 898	\$187 760
Sales and Marketing and Other Expenses	\$1 850	\$2 000	\$2 150
Depreciation	\$2 070	\$2 070	\$2 070
Leased Equipment	\$0	\$0	\$0
Utilities	\$4 000	\$4 250	\$4 500
Insurance	\$1 800	\$1 800	\$1 800
Rent	\$6 500	\$7 000	\$7 500
Payroll Taxes	\$34 510	\$40 726	\$46 942
Other	\$0	\$0	\$0
Total Operating Expenses	\$188 766	\$220 744	\$252 722
Profit Before Interest and Taxes	\$105 205	\$146 040	\$186 875
EBITDA	\$107 275	\$148 110	\$188 945
Interest Expense	\$0	\$0	\$0
Taxes Incurred	\$26 838	\$37 315	\$47 792
Net Profit	\$78 367	\$108 725	\$139 083
Net Profit/Sales	30,00%	39,32%	48,64%

Profit Yearly



Financial Year	Profit
Year1	10000
Year2	12000
Year3	14000

Gross Margin Yearly



Financial Year	Gross Margin
Year1	10000
Year2	12000
Year3	14000

Projected Cash Flow

Cash Received	Year 1	Year 2	Year 3
Cash from Operations			
Cash Sales	\$40 124	\$45 046	\$50 068
Cash from Receivables	\$7 023	\$8 610	\$9 297
SUBTOTAL CASH FROM OPERATIONS	\$47 143	\$53 651	\$59 359
Additional Cash Received			
Sales Tax, VAT, HST/GST Received	\$0	\$0	\$0
New Current Borrowing	\$0	\$0	\$0
New Other Liabilities (interest-free)	\$0	\$0	\$0
New Long-term Liabilities	\$0	\$0	\$0
Sales of Other Current Assets	\$0	\$0	\$0
Sales of Long-term Assets	\$0	\$0	\$0
New Investment Received	\$0	\$0	\$0
SUBTOTAL CASH RECEIVED	\$47 143	\$53 651	\$55 359
Expenditures from Operations			
Cash Spending	\$21 647	\$24 204	\$26 951
Bill Payments	\$13 539	\$15 385	\$170 631
SUBTOTAL SPENT ON OPERATIONS	\$35 296	\$39 549	\$43 582
Additional Cash Spent			
Sales Tax, VAT, HST/GST Paid Out	\$0	\$0	\$0
Principal Repayment of Current Borrowing	\$0	\$0	\$0
Other Liabilities Principal Repayment	\$0	\$0	\$0
Long-term Liabilities Principal Repayment	\$0	\$0	\$0
Purchase Other Current Assets	\$0	\$0	\$0
Purchase Long-term Assets	\$0	\$0	\$0
Dividends	\$0	\$0	\$0
SUBTOTAL CASH SPENT	\$35 296	\$35 489	\$43 882
Net Cash Flow	\$11 551	\$13 167	\$15 683

Cash Received	Year 1	Year 2	Year 3
Cash Balance	\$21 823	\$22 381	\$28 239

Projected Balance Sheet

Assets	Year 1	Year 2	Year 3
Current Assets			
Cash	\$184 666	\$218 525	\$252 384
Accounts Receivable	\$12 613	\$14 493	\$16 373
Inventory	\$2 980	\$3 450	\$3 920
Other Current Assets	\$1 000	\$1 000	\$1 000
TOTAL CURRENT ASSETS	\$201 259	\$237 468	\$273 677
Long-term Assets			
Long-term Assets	\$10 000	\$10 000	\$10 000
Accumulated Depreciation	\$12 420	\$14 490	\$16 560
TOTAL LONG-TERM ASSETS	\$980	\$610	\$240
TOTAL ASSETS	\$198 839	\$232 978	\$267 117
Current Liabilities			
Accounts Payable	\$9 482	\$10 792	\$12 102
Current Borrowing	\$0	\$0	\$0
Other Current Liabilities	\$0	\$0	\$0
SUBTOTAL CURRENT LIABILITIES	\$9 482	\$10 792	\$12 102
Long-term Liabilities	\$0	\$0	\$0
TOTAL LIABILITIES	\$9 482	\$10 792	\$12 102
Paid-in Capital	\$30 000	\$30 000	\$30 000
Retained Earnings	\$48 651	\$72 636	\$96 621
Earnings	\$100 709	\$119 555	\$138 401
TOTAL CAPITAL	\$189 360	\$222 190	\$255 020
TOTAL LIABILITIES AND CAPITAL	\$198 839	\$232 978	\$267 117
Net Worth	\$182 060	\$226 240	\$270 420

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%
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.

	Year 1	Year 2	Year 3	Industry Profile
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.
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.

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