



Self Storage

ADDRESS

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<http://www.example.com>

CONTACT

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info@example.com

Business Plan

[YEAR]

Prepared By

John Doe



Storage for you, anytime, anywhere.

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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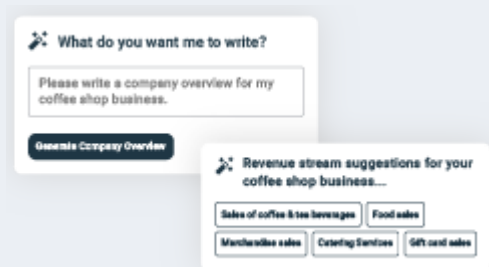
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1.

Executive Summary

Keys to Success

Mission Statement

Vision Statement

Financial Summary



REMEMBER

Before you think about how to start a Storage and Warehouse business, you must create a detailed Storage and Warehouse business plan. It will not only guide you in the initial phases of your startup but will also help you in the long run.

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Maxwell – Storage and Warehouse

Maxwell – Storage and Warehouse, LLC is a licensed, standard, and secured self-storage and warehouse facility that will be located in a growing community in Detroit – Michigan. Our basic aim of setting up the business is to make available self-storage and warehouse facilities to the community.

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Keys to Success

Maxwell – Storage and Warehouse

The keys to success in the self-storage business are:

- To provide dry, secure, and clean facilities with convenient access.

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Mission Statement

Maxwell – Storage and Warehouse

Our mission for establishing Maxwell – Storage and Warehouse, LLC is to build a standard and well-secured self-storage and warehouse facility that can favorably compete in the industry in the United States of America and in the world.

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Vision Statement

Maxwell – Storage and Warehouse

- Our Vision of starting Maxwell – Storage, and Warehouse, LLC is to build a hedge brand that will become one of the top choices for residents and businesses in the whole of

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Financial Summary

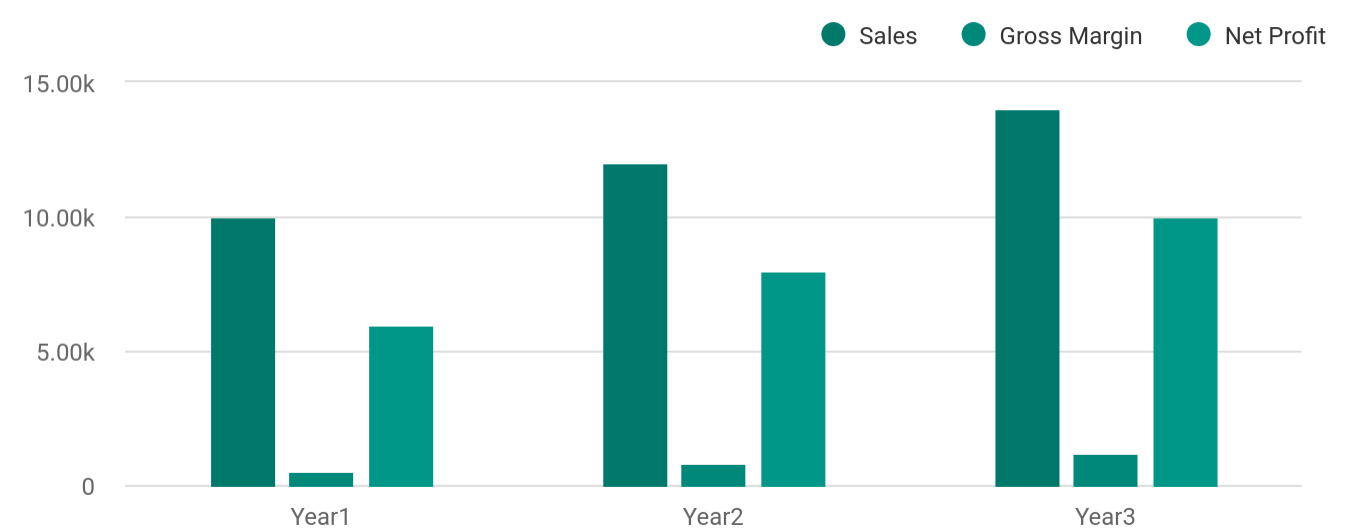
Maxwell – Storage and Warehouse

Advertising and promotion will rely heavily on ads in the Yellow Pages, as well as initial local newspaper ads at the time of opening. We are assuming three directories for Yellow Pages ads with 1/8th page ads costing \$165/month each. The ads in the local p

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3 Year profit forecast



Maxwell – Storage and Warehouse

Financial Summary

Year 1

Year 2

Year 3

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2.

Company Summary

Business Structure

Startup summary

Maxwell – Storage and Warehouse

Maxwell – Storage and Warehouse, LLC is owned by John Moore and Jammes Moore, his business partners for many years. The business will be managed by both of them since they have the adequate working experience to manage such business. John Moore has been in the business for many years and has a lot of experience in the industry.

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Business Structure

Maxwell – Storage and Warehouse

Maxwell – Storage and Warehouse, LLC is in business to become the leading self-storage and warehouse facility in the whole of Detroit – Michigan and we are fully aware that it will take the right facility, management, and organization – structure to achieve our goal.

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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 – Storage and Warehouse

Maxwell – Storage and Warehouse, LLC is in the self-storage and warehouse facility business to provide safe short-term storage facilities for residents of Detroit – Michigan which is why we have been able to put up a facility that can help us achieve the goal.

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5-by-5-foot storage spaces



5-by-10-foot storage spaces



10-by-10-foot storage spaces



10-by-15-foot storage spaces



10-by-20-foot storage spaces



10-by-25-foot storage spaces



**Leasing or rental of mini
warehouses and self-storage
units**



**Rental of self-storage
warehousing**



Rental of coin operated lockers



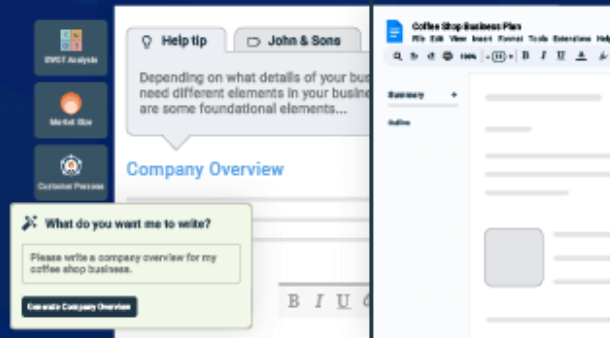
U-lock storage



Other facility operation

Upmetrics vs Business Plan Templates

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.

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4.

Market Analysis

Market Trends

Target Market

Marketing Segmentation



REMEMBER

The most important component of an effective Storage and Warehouse business plan is its accurate marketing analysis. If you are starting on a smaller scale, you can do marketing analysis yourself.

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Market Trends

Maxwell – Storage and Warehouse

The trend in the self-storage and warehouse rental industry is such that if a self-storage and warehouse facility is well positioned in a residential area or a place where people can easily access without much stress, there is the likelihood that the facility will

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Target Market

Maxwell – Storage and Warehouse

We are aware of the fact that for any business to thrive so well in profit, it has to first and foremost define its market. The target market for self-storage and warehouse facilities cuts across people of different walks of life. The fact that people would need

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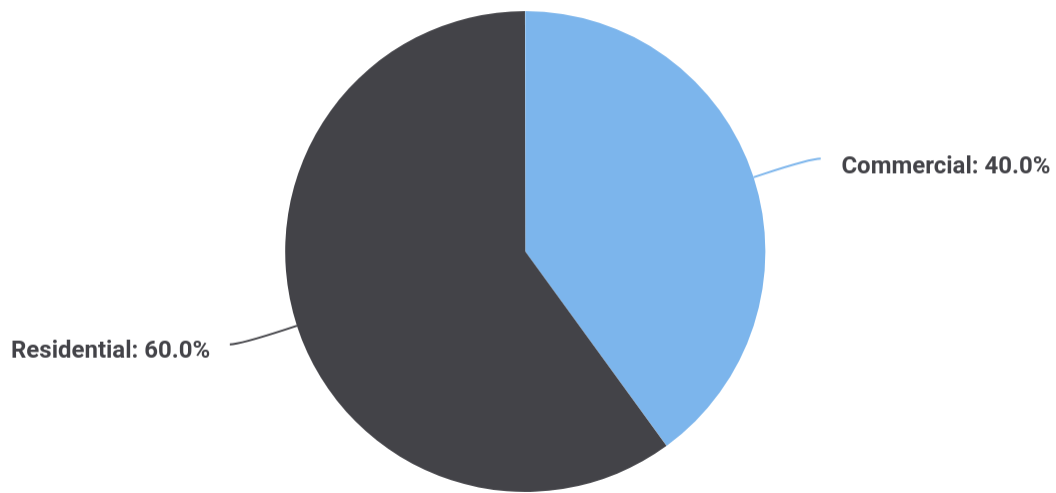
Marketing Segmentation

Maxwell – Storage and Warehouse

Self-storage units are needed by residential customers for the storage of personal items as well as by commercial customers for storage of stock. It is envisaged that 70% of the planned self-storage units will be taken up by the residential segment of the market.

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Maxwell – Storage and Warehouse

Potential Customers

Growth

Year1

Year2

Year3

CAGR

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5.

SWOT Analysis

Maxwell – Storage and Warehouse

Maxwell – Storage and Warehouse, LLC engaged the services of a core professional in the area of business consulting and structuring to assist the firm in building a well-structured self-storage and warehouse rental business that can favorably compete in the market.

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Strength

One of the obvious strengths that will definitely stand as a plus for Maxwell – Storage and Warehouse, LLC is the fact that our facility is centrally located in a densely populated – residential area in Detroit – Michigan; our location and high level of security is in fact our major strength.

We equally have a team that can go all the way to give our clients value for their money; a team that is trained and equipped to pay attention to details and to deliver excellent services. Lastly, our rental package is one of the best that anybody living in Detroit – Michigan can get; it is cheap and affordable.

Weakness

We critically looked into our Business model and we were able to identify two major weaknesses. One is the fact that we are a new business and the second is the fact that we may not have the financial resources required to match up with existing and well-established self-storage and warehouse facility rental companies when it comes to acquiring large facilities in choice areas.

Opportunity

We are centrally located in one of the busiest areas and densely populated areas in Detroit – Michigan and we are open to all the available opportunities that the city has to offer. We will be open 24 hours a day during weekends (Fridays to Sundays) and from 6:00 am to 12 midnight from Mondays to Thursdays giving us the advantage to leverage on any available opportunity.

Threat

Some of the threats that are likely going to confront Maxwell – Storage and Warehouse, LLC are unfavorable government policies, demographic/social factors, the downturn in the economy which is likely going to affect consumers spending, and lastly, the emergence of new competitors within the same location where our self – storage and warehouse facility is located.

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

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Sales Strategy

Maxwell – Storage and Warehouse

Most inquiries will come through the Yellow Pages ads. Proper telephone manners and professional handling of on-site inquiries are essential. Even though there is an excess of demand oversupply, an unfriendly manager or clumsiness over the tel

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Advertising Strategy

Maxwell – Storage and Warehouse

We have been able to work with our branding and publicity consultants to help us map out publicity and advertising strategies that will help us walk our way into the heart of our target market. We are set to become the number one choice for both corpor

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Pricing Strategy

Maxwell – Storage and Warehouse

Our pricing system is going to be based on what is obtainable in the industry, we don't intend to charge more (except for premium and customized services) and we don't intend to charge less than what our competitors are charging their members in Detroit – Mi

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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 Storage and Warehouse 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 financed.

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Maxwell – Storage and Warehouse

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 Storage and Warehouse business start-up, no equity funding or outside loans will be required.

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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	\$485,524.90	\$1,300,942.60	\$2,312,427.55
Monthly Storage Rentals	\$181,389.50	\$483,733	\$834,538.75
Users	1,076	2,097	3,420
Recurring Charges	\$25	\$25	\$25
Sale of Packing Supplies	\$60,000	\$63,392.80	\$84,731.40
Unit Sales	3,000	3,170	4,237
Unit Price	\$20	\$20	\$20
Vehicle Storage	\$244,135.40	\$753,816.80	\$1,393,157.40
Users	1,923	4,251	7,245
Recurring Charges	\$20	\$20	\$20
Cost Of Sales	\$35,933.74	\$43,461.09	\$53,207.27
General Costs	\$35,933.74	\$43,461.09	\$53,207.27
Product Procurement Costs	\$14,373.51	\$19,166.28	\$25,831.26
Cannabis Flower Purchase	\$4,438.97	\$5,001.98	\$5,636.25
Edible Procurement	\$9,934.54	\$14,164.30	\$20,195.01
Packaging and Labeling	\$21,560.23	\$24,294.81	\$27,376.01
Product Packaging	\$8,877.70	\$10,003.71	\$11,272.57
Safety Labels	\$12,682.53	\$14,291.10	\$16,103.44
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$449,591.16	\$1,257,481.51	\$2,259,220.28

	2024	2025	2026
Gross Margin (%)	92.60%	96.66%	97.70%
Operating Expense	\$419,046.62	\$438,484.05	\$459,459.29
Payroll Expense (Indirect Labor)	\$344,220	\$354,168	\$364,450.08
Management Team	\$120,960	\$126,028.80	\$131,321.64
General Manager	\$72,000	\$75,600	\$79,380
Assistant Manager	\$48,960	\$50,428.80	\$51,941.64
Operational Staff	\$128,100	\$130,662	\$133,275.24
Storage Facility Attendant	\$66,000	\$67,320	\$68,666.40
Maintenance Worker	\$62,100	\$63,342	\$64,608.84
Administrative Staff	\$95,160	\$97,477.20	\$99,853.20
Office Administrator	\$41,400	\$42,642	\$43,921.32
Customer Services Representative	\$53,760	\$54,835.20	\$55,931.88
General Expense	\$74,826.62	\$84,316.05	\$95,009.21
Utilities and Rent	\$48,193.47	\$54,305.51	\$61,192.83
Electricity	\$10,145.95	\$11,432.68	\$12,882.69
Rent	\$38,047.52	\$42,872.83	\$48,310.14
Marketing and Advertising	\$17,755.49	\$20,007.17	\$22,544.42
Online Advertising	\$11,414.25	\$12,861.83	\$14,492.90
Local Events Sponsorship	\$6,341.24	\$7,145.34	\$8,051.52
Maintenance And Supplies	\$8,877.66	\$10,003.37	\$11,271.96
Bike Repair Tools	\$5,072.96	\$5,716.24	\$6,441.23
Cleaning Supplies	\$3,804.70	\$4,287.13	\$4,830.73
Bad Debt	\$0	\$0	\$0

	2024	2025	2026
Amortization of Current Assets	\$0	\$0	\$0
EBITDA	\$30,544.54	\$818,997.46	\$1,799,760.99
Additional Expense	\$31,439.05	\$30,348.56	\$29,190.82
Long Term Depreciation	\$25,920	\$25,920	\$25,920
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	\$4,624.54	\$793,077.46	\$1,773,840.99
Interest Expense	\$5,519.05	\$4,428.56	\$3,270.82
EBT	(\$894.51)	\$788,648.90	\$1,770,570.17
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$486,419.41	\$512,293.70	\$541,857.38
Net Income	(\$894.51)	\$788,648.90	\$1,770,570.17
Net Income (%)	(0.18%)	60.62%	76.57%
Retained Earning Opening	\$0	(\$22,894.51)	\$743,754.39
Owner's Distribution	\$22,000	\$22,000	\$22,000
Retained Earning Closing	(\$22,894.51)	\$743,754.39	\$2,492,324.56

Projected Cash Flow

	2024	2025	2026
Cash Received	\$485,524.90	\$1,300,942.60	\$2,312,427.55
Cash Paid	\$460,499.41	\$486,373.70	\$515,937.38
COS & General Expenses	\$110,760.36	\$127,777.14	\$148,216.48
Salary & Wages	\$344,220	\$354,168	\$364,450.08
Interest	\$5,519.05	\$4,428.56	\$3,270.82
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	\$25,025.49	\$814,568.90	\$1,796,490.17
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$500,000	\$0	\$0
Net Cash From Investments	(\$500,000)	\$0	\$0
Amount Received	\$104,000	\$0	\$0
Loan Received	\$100,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$4,000	\$0	\$0
Amount Paid	\$39,680.31	\$40,770.80	\$41,928.54
Loan Capital	\$17,680.31	\$18,770.80	\$19,928.54
Dividends & Distributions	\$22,000	\$22,000	\$22,000
Net Cash From Financing	\$64,319.69	(\$40,770.80)	(\$41,928.54)

	2024	2025	2026
Summary			
Starting Cash	\$0	(\$410,654.82)	\$363,143.28
Cash In	\$589,524.90	\$1,300,942.60	\$2,312,427.55
Cash Out	\$1,000,179.72	\$527,144.50	\$557,865.92
Change in Cash	(\$410,654.82)	\$773,798.10	\$1,754,561.63
Ending Cash	(\$410,654.82)	\$363,143.28	\$2,117,704.91

Projected Balance Sheet

	2024	2025	2026
Assets	\$63,425.18	\$811,303.28	\$2,539,944.91
Current Assets	(\$410,654.82)	\$363,143.28	\$2,117,704.91
Cash	(\$410,654.82)	\$363,143.28	\$2,117,704.91
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$474,080	\$448,160	\$422,240
Gross Long Term Assets	\$500,000	\$500,000	\$500,000
Accumulated Depreciation	(\$25,920)	(\$51,840)	(\$77,760)
Liabilities & Equity	\$63,425.18	\$811,303.28	\$2,539,944.91
Liabilities	\$82,319.69	\$63,548.89	\$43,620.35
Current Liabilities	\$18,770.80	\$19,928.54	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0

	2024	2025	2026
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$18,770.80	\$19,928.54	\$0
Long Term Liabilities	\$63,548.89	\$43,620.35	\$43,620.35
Long Term Debt	\$63,548.89	\$43,620.35	\$43,620.35
Equity	(\$18,894.51)	\$747,754.39	\$2,496,324.56
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$4,000	\$4,000	\$4,000
Retained Earnings	(\$22,894.51)	\$743,754.39	\$2,492,324.56
Check	\$0	\$0	\$0

Business Ratios

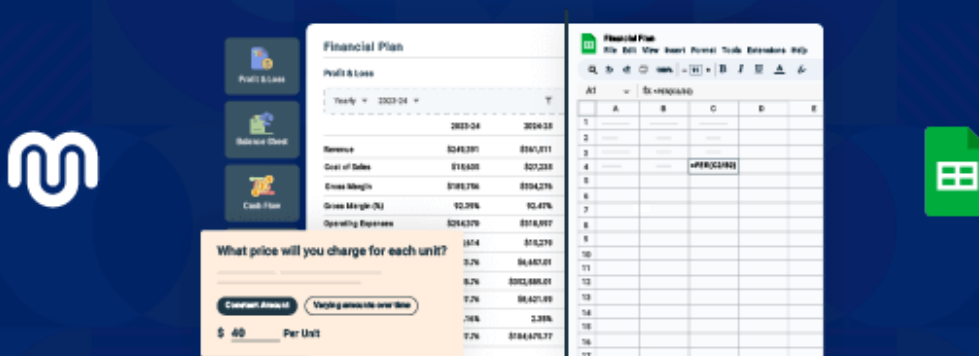
	Year 1	Year 2	Year 3	Industry Profile
Sales Growth	4,35%	30,82%	63,29%	4,00%
Percent of Total Assets				
Accounts Receivable	5,61%	4,71%	3,81%	9,70%
Inventory	1,85%	1,82%	1,79%	9,80%
Other Current Assets	1,75%	2,02%	2,29%	27,40%
Total Current Assets	138,53%	150,99%	163,45%	54,60%
Long-term Assets	-9,47%	-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%

	Year 1	Year 2	Year 3	Industry Profile
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.
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.

	Year 1	Year 2	Year 3	Industry Profile
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.

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 compares Upmetrics and Financial Spreadsheets. On the left is the Upmetrics logo. In the center is a screenshot of the Upmetrics 'Financial Plan' interface, showing a 'Profit & Loss' statement with columns for '2023-04' and '2024-03'. The statement includes items like Revenue, Cost of Sales, Gross Margin, and Operating Expenses. Below the statement is a 'What price will you charge for each unit?' section with a 'Constant Assumptions' button and a 'Varying assumptions over time' button. On the right is a screenshot of a standard financial spreadsheet, showing a grid with columns A through E and rows 1 through 17. A green Google Sheets icon is also visible.

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.

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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

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