



Small Business


BUSINESS PLAN


[Your Tagline]



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Table of Contents

Executive Summary	6
Business Description	7
Mission Statement	7
Goals	7
Plan Summary	8
Capital Request	8
Business Description	9
Business Overview	10
Location	10
Facilities	10
Business History	11
Ownership Structure	11
Owners	11
Operations	12
Products	13
Services	13
Production System	13
Customer Service	14
Inventory Management	14
Licenses, Permits & Regulations	14
Patents and Trademarks	15
Risk Management	15
Environmental Issues	15
Quality Control	16
Implementation Timeline	16
Market Analysis	18
Industry analysis	19

Market Trends	19
Customers	19
Market Segments	20
Target Market	20
Market Size & Growth	20

Marketing Plan 22

Marketing Contracts	23
Strategic Partners	23
Pricing	23
Promotion	24
Distribution	24
Competitive Advantage	24
SWOT Analysis	25

Management & Organization 26

Management Team	27
John Doe	27
Board of Directors	27
John Doe	27
Advisory Board	28
John Doe	28
Personnel Plan	28
Professional Services	28

Financial Plan 29

Financial Position	30
Historical Performance	30
Financial Projections	30
Profit & Loss	31
Cash Flow	32
Balance Sheet	33
Benchmarks	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.

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1.

Executive Summary

Business Description

Mission Statement

Goals

Plan Summary

Capital Request



REMEMBER

The Executive Summary is the first page of your business plan(for Readers), but it should be the last chapter you write. It acts as both the introduction to, and the summary of, your entire idea. In other words

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Business Description

Help Tip

Riverbend Farm

Lakeshore Orchard

Provide a brief description of your operation. In a few sentences, help people who are unfamiliar with your business develop an understanding of what you produce, the size of your operation, and how you market your products.

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Start writing here..

Mission Statement

Help Tip

A mission statement describes the fundamental purpose of your business,



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Goals

Help Tip

Goals help you communicate to others what you expect your business to accomplish. They should be specific, measurable, and attainable. You may want to include separate business and personal goals, as well as considering both short term and long term

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Start writing here..

Plan Summary

Help Tip

Give a brief summary of your business plan. If you are starting a new business or making changes to your current business, describe what you intend to do, how you plan to do it, and the expected results. In particular, summarize your financial plan and your


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Capital Request

Help Tip

The most common reason for developing a business plan is to be able to present your ideas for a new or expanded business to investors or lenders. After you have described your plan, they will want to know how much money you need and the purpose for which

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Start writing here..

2.

Business Description

Business Overview

Location

Facilities

Business History

Ownership Structure



REMEMBER

Use this section and the following subsections to describe your business.

If you want a very brief business plan, write a full description in this main

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Business Overview

Help Tip

Briefly describe your business.

- What products do you produce, or what services do you provide?

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Start writing here..

Location

Help Tip

- Where is your business located?
- Do you have multiple branches or locations?

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Facilities


Help Tip


Describe the size, type, and quality of your facilities and equipment. What about processing or marketing facilities? Describe the condition of your equipment and facilities.

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Business History

 Help Tip

 Farming

Describe the history of your business and your value-added enterprise(s).


- When and how did it start?

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Start writing here..

Ownership Structure

 Help Tip

 Farming

Describe the ownership and legal structure of the business.

- Is it a sole proprietorship, partnership, corporation, limited liability partnership, or

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Start writing here..

Owners

3.

Operations

Products

Services

Production System

Customer Service

Inventory Management

Licenses, Permits & Regulations

Patents and Trademarks

Risk Management

Environmental Issues

Quality Control

Implementation Timeline



REMEMBER

Use this section and the following sub-sections to describe the operations of your business, including what you produce, how much you produce, and how you produce it.

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Products

Help Tip

Farming

If your business sells any products, provide a short description of each of the primary products you produce. You may want to describe the relative importance of each product to the overall profitability of your business. If you have more than a few products, you

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Services

Help Tip

If your business sells services (i.e. custom work, hunting leases, tourism, consulting) provide a short description of each of the primary services you provide. Indicate the volume or quantity of each service. If you offer more than one service, describe the relative

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Start writing here..

Production System

Help Tip

Farming

In this section, discuss how it is that you do what you do. Describe your production or service delivery processes (manufacturing, etc.).

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Start writing here..

Customer Service

Help Tip

Good customer service is critical to maintaining and growing your customer base and is important whether you sell products or services. Describe what you do to provide good customer service.

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Start writing here..

Inventory Management

Help Tip

- How important is inventory management and storage for your business?
- Do you produce and distribute your product quickly or do you carry an inventory?
- Can you improve profits by turning your inventory more quickly?

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Start writing here..

Licenses, Permits & Regulations

Help Tip

Obtaining permits and understanding regulations are important factors when considering changes in any business. If your business requires licenses or permits (either now, or as a result of any changes you are planning to make in connection with this business plan).

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Start writing here..

Patents and Trademarks

Help Tip

If you have patents, brands, or trademarks, or are in the process of obtaining them, document them and describe why they are important for your business.

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Start writing here..

Risk Management

Help Tip

Farming

There are many risks associated with businesses, including production and weather risks, natural disasters, market and price risks, health and worker safety, legal liabilities, and financial risks. In this section, describe the methods and tools you use to manage these risks.

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Start writing here..

Environmental Issues

Help Tip

Farming


Environmental concerns and regulations are an important part of managing some business. Describe the environmental considerations associated with your enterprise(s) and how you address them.

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Start writing here..

Quality Control

 Help Tip

 Farming

- What do you do in your business to deliver consistent, high-quality products or services?
- How do you build or maintain your reputation?

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Start writing here..

Implementation Timeline

 Help Tip

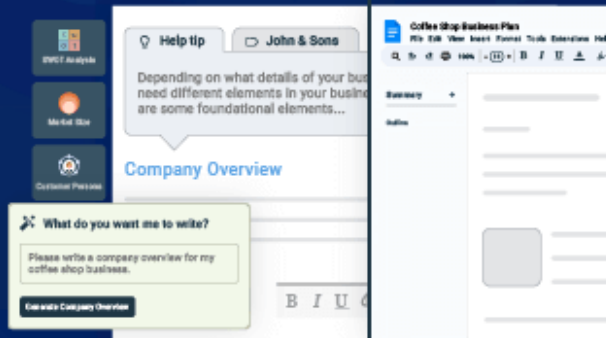
You have described your strategy. Now it is time to describe how you will get to where you want to be with your business. If you are going to be making major changes in the business, describe what will happen during the transition period.

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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

Industry analysis

Market Trends

Customers

Market Segments

Target Market

Industry analysis

💡 Help Tip

Give a brief overview of the industry. Define the industry in terms of historical background, the geographic area it services, and the products it offers. Describe how your company will position itself within the industry. Focus on how your company can take advantage of the industry.

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Start writing here..

Market Trends

💡 Help Tip

Describe the market trends for your primary products or services and how they will impact your business.

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Start writing here..

Customers

💡 Help Tip

- Who are the customers for your primary products?
- Do you anticipate those customer changing? If so, what are the characteristics of these new customers that must be factored into your marketing plan?

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Start writing here..

Market Segments

Help Tip

Market segments are groups of customers that have similar needs or who will respond similarly to a marketing approach. You probably have different groups or types of customers to which you market your products.

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Target Market

Help Tip

Who are your target markets? Identifying and understanding the market segments does not mean they will all be markets that you want to target.

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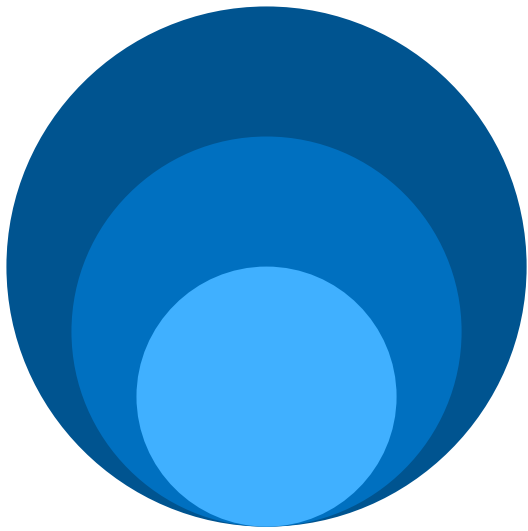
Help Tip

Indicating to your readers that your problem addresses a big enough market will play a huge role in how excited they'll be about getting involved in helping your company. This is where you'll want to put your research cap on and start uncovering some numbers.

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Market Size & Growth

Start writing here..



Available Market

10k

Served Market

7k

Target Market

5k

5.

Marketing Plan

Marketing Contracts

Strategic Partners

Pricing

Promotion

Distribution

Competitive Advantage

SWOT Analysis



REMEMBER

Use your marketing plan to describe what products you are marketing, how you will market the products when you will market the products, and to whom you will sell the products. A marketing plan includes:

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Marketing Contracts

Help Tip

Describe contracts that you have to produce and market products with processors, other producers, value-added ventures, or retail markets. If you provide services, describe the contracts that you have to deliver your services. Are there new contracts?

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Strategic Partners

Help Tip

- Do you have strategic marketing, purchasing, distribution, promotion, or development alliances?
- How important are they to your business?

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Pricing

Help Tip

List the prices that you charge for your primary products or services. Why do you charge these prices? There are generally two major factors that determine prices: your cost to produce the product or provide the service, and the market price of comparable products or services.

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Promotion

Help Tip

How will you promote your products or services? Your promotion plan will be different if you have an established market and name recognition compared to promoting new products or starting a new business.

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Distribution

Help Tip

How do you distribute your products or services to your customers? Do you distribute to wholesale or retail markets? Do you distribute your products geographically; locally, regionally, nationally, or internationally?

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Competitive Advantage

Help Tip

Who are your competitors? How well do you compete with them? Are your products different? Do you produce at a lower cost? Do you have better delivery or customer service? Do you have better market access? Do you have better brand recognition or customer service?

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SWOT Analysis

Strength

Mention positive tangible and intangible attributes. Internal to your organization, which are within the organization's control.

Weakness

Factors that are within an organization's control that detract from its ability to attain the core goal. In which areas might the organization improve?

Opportunity

External attractive factors that represent the reason for an organization to exist and develop. What opportunities exist in the environment which will propel the organization?

Threat

External factors, beyond an organization's control, which could place the organization's mission or operation at risk. The organization may benefit by having contingency plans to address them should they occur.

6.

Management & Organization

Management Team

Board of Directors

Advisory Board

Personnel Plan

Professional Services

Management Team

Help Tip

List the members of your management team. Briefly describe their qualifications and their management roles. What major management functions need to be handled in your business? Are there gaps in your management team that need to be filled? How

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John Doe

CEO - johnd@example.com

Briefly describe his qualifications and his management/business roles.

Board of Directors

Help Tip

If you are a corporation with a board of directors, list the board members, their affiliations, and the strengths they bring to your business. Describe how the board functions and how it participates in or oversees the management of the business.

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John Doe

Board Member - johnd@example.com

Advisory Board

Help Tip

Some businesses have an advisory board rather than a board of directors. If you have an advisory board, list the board members, their affiliations, and the strengths they bring to your business. Describe how the board functions and how it contributes to your business.

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John Doe

Advisory Board Member - johnd@example.com

Personnel Plan

Help Tip

List the major tasks, including operations, marketing, and financial, that must be accomplished in your business and describe who is responsible for each task or how many employees work in each area.

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Professional Services

Help Tip

Many of today's businesses hire professional services or consultants, like custom operators, accountants, tax preparers, and veterinarians. Professional services could include accounting, marketing, financial planning, crop scouting, nutrition, etc. If you use professional services, list them and describe how they contribute to your business.

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7.

Financial Plan

Financial Position

Historical Performance

Financial Projections

Benchmarks

Capital Request

Financial Position

Help Tip

The financial position of your business communicates the financial resources you have available and your ability to withstand future risks. Your financial position can be evaluated in terms of the solvency and liquidity position of your business.

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Historical Performance

Help Tip

Historical performance is considered a good indicator of future performance. Document key financial and production measures from the past three to five years and show the trends for yields, production levels, net income, and other key measures.

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Financial Projections

Help Tip

If you are starting or expanding a business, your financial projections may be the most important component of your business plan. How do you know if your plans will be financially feasible and how will you communicate your financial projections to others?

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Profit & Loss

	2024-25	2025-26	2026-27
Revenue	\$0	\$0	\$0
Cost Of Sales	\$0	\$0	\$0
General Costs	\$0	\$0	\$0
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$0	\$0	\$0
Gross Margin (%)	0%	0%	0%
Operating Expense	\$0	\$0	\$0
Payroll Expense (Indirect Labor)	\$0	\$0	\$0
General Expense	\$0	\$0	\$0
Bad Debt	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0
EBITDA	\$0	\$0	\$0
Additional Expense	\$0	\$0	\$0
Long Term Depreciation	\$0	\$0	\$0
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	\$0	\$0	\$0

	2024-25	2025-26	2026-27
Interest Expense	\$0	\$0	\$0
EBT	\$0	\$0	\$0
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$0	\$0	\$0
Net Income	\$0	\$0	\$0
Net Income (%)	0%	0%	0%
Retained Earning Opening	\$0	\$0	\$0
Owner's Distribution	\$0	\$0	\$0
Retained Earning Closing	\$0	\$0	\$0

Cash Flow

	2024-25	2025-26	2026-27
Cash Received	\$0	\$0	\$0
Cash Paid	\$0	\$0	\$0
COS & General Expenses	\$0	\$0	\$0
Salary & Wages	\$0	\$0	\$0
Interest	\$0	\$0	\$0
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	\$0	\$0	\$0
Assets Sell	\$0	\$0	\$0

	2024-25	2025-26	2026-27
Assets Purchase	\$0	\$0	\$0
Net Cash From Investments	\$0	\$0	\$0
Amount Received	\$0	\$0	\$0
Loan Received	\$0	\$0	\$0
Common Stock			
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0
Amount Paid	\$0	\$0	\$0
Loan Capital	\$0	\$0	\$0
Dividends & Distributions	\$0	\$0	\$0
Net Cash From Financing	\$0	\$0	\$0
Summary			
Starting Cash	\$0	\$0	\$0
Cash In	\$0	\$0	\$0
Cash Out	\$0	\$0	\$0
Change in Cash	\$0	\$0	\$0
Ending Cash	\$0	\$0	\$0

Balance Sheet

	2024-25	2025-26	2026-27
Assets	\$0	\$0	\$0
Current Assets	\$0	\$0	\$0
Cash	\$0	\$0	\$0

	2024-25	2025-26	2026-27
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$0	\$0	\$0
Gross Long Term Assets	\$0	\$0	\$0
Accumulated Depreciation	\$0	\$0	\$0
Liabilities & Equity	\$0	\$0	\$0
Liabilities	\$0	\$0	\$0
Current Liabilities	\$0	\$0	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$0	\$0	\$0
Long Term Liabilities	\$0	\$0	\$0
Long Term Debt	\$0	\$0	\$0
Equity	\$0	\$0	\$0
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0
Retained Earnings	\$0	\$0	\$0
Check	\$0	\$0	\$0

Benchmarks

Help Tip

Benchmarking is increasingly important. Benchmarking lets you compare your business' performance to similar businesses. It gives you and those reviewing your plan a perspective on how well your business is doing or is projected to do relative to similar businesses.

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Start writing here..

Capital Request

Help Tip

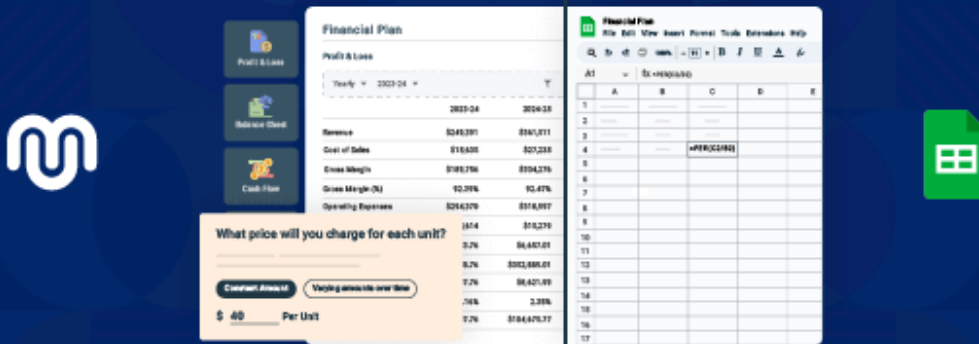
The most common reason for developing a business plan is to present your ideas for a new or expanded business to investors or lenders. They want to know how much money you need and the purpose for which you need it. Use this section to communicate your needs.

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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 a side-by-side comparison of two financial planning tools. On the left is the Upmetrics interface, which is clean and user-friendly. It features a sidebar with icons for 'Profit & Loss', 'Balance Sheet', and 'Cash Flow'. The main area displays a 'Financial Plan' for 'Profit & Loss' for the year 2023-24. A table shows financial metrics for two periods: 2023-24 and 2024-25. Below the table is a form to input 'What price will you charge for each unit?' with a 'Convert Annual' button and a 'Viewing amounts over time' option. On the right is a standard spreadsheet interface with a grid and various toolbars. A green document icon with a grid pattern is positioned to the right of the spreadsheet.

	2023-24	2024-25
Revenue	\$241,291	\$181,811
Cost of Sales	\$16,620	\$27,233
Gross Margin	\$191,756	\$154,276
Gross Margin (%)	79.5%	85.0%
Operating Expenses	\$214,379	\$118,987
	104	\$1,279
	0.2%	\$6,687.01
	0.2%	\$102,888.01
	0.2%	\$6,621.89
	0.6%	2,386
	0.2%	\$184,670.17

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.

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Pitch decks that impress investors

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Mariia Yevlash



Student, Sumy State University – Ukraine

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

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AI Business Plan Platform

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