








# BUSINESS PLAN [YEAR]



## Health Coaching Business Plan

Empower Your Health Journey

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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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## Appendix

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# 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

Market opportunity

Services Offered

Marketing & Sales Strategies

Financial Highlights



## REMEMBER

An executive summary is the first section of the business plan intended to provide an overview of the whole business plan.

To unlock help try Upmetrics!

### Help tip

### Health Coaching Business Plan

Start your executive summary by briefly introducing your business to your readers.

This section may include the name of your health coaching business, its location, when it was

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*Start writing here..*

## Market opportunity

### Help tip

### Health Coaching Business Plan

Summarize your market research, including market size, growth potential, and marketing trends. Highlight the opportunities in the market and how your business will fit in to fill the gap.

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*Start writing here..*

## Services Offered

### Help tip

### Health Coaching Business Plan

Highlight the health coaching services you offer your clients. The USPs and differentiators you offer are always a plus.

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## Marketing & Sales Strategies

 **Help tip**

 **Health Coaching Business Plan**


Outline your sales and marketing strategies—what marketing platforms you use, how you plan on acquiring customers, etc.

To unlock help try Upmetrics! 

*Start writing here..*

## Financial Highlights

 **Help tip**

 **Health Coaching Business Plan**

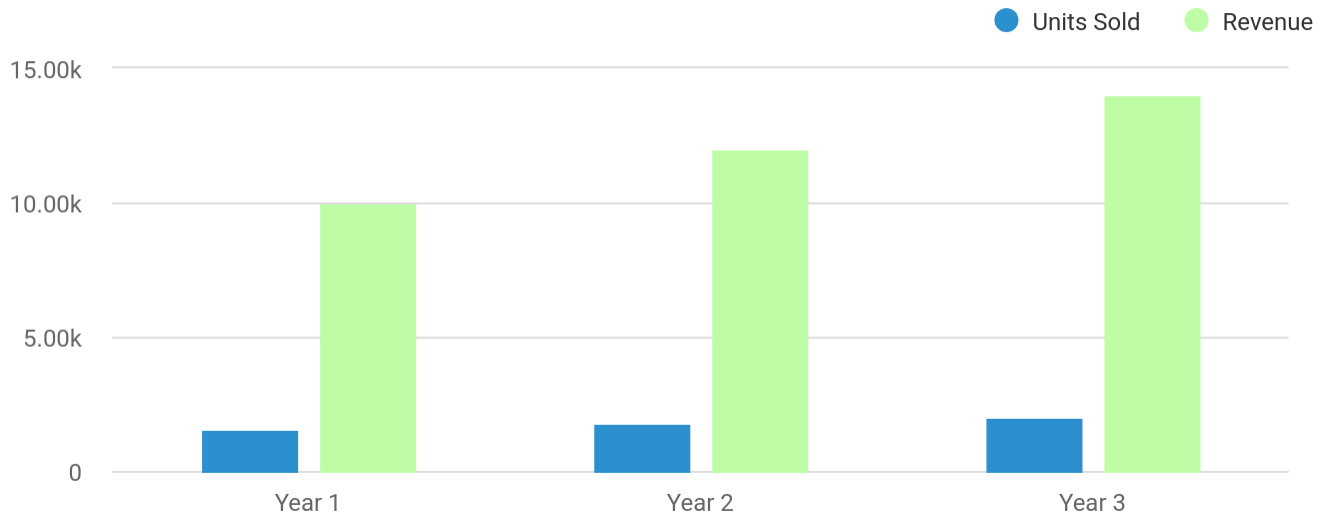
Briefly summarize your financial projections for the initial years of business operations. Include any capital or investment requirements, associated startup costs, projected revenues, and profit forecasts.

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*Start writing here..*



## Units Sold v/s Revenue



Financial Year	Units Sold	Revenue
Year 1	1,550	\$10,000
Year 2	1,800	\$12,000
Year 3	2,050	\$14,000

 Help tip

 Health Coaching Business Plan

Summarize your executive summary section with a clear CTA, for example, inviting angel investors to discuss the potential business investment.

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*Write a call to action for your business plan.*

# 2.

## Company Overview

Ownership

Mission statement

Business history

Future goals



## REMEMBER

Depending on what details of your business are essential, you'll need different elements in your business overview.

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### Help tip

### Health Coaching Business Plan

Describe your business in this section by providing all the basic information:

Describe what kind of health coaching business you run and the name of it. You may specialize

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*Start writing here..*

## Ownership

### Help tip

### Health Coaching Business Plan


List the names of your health coaching business's founders or owners. Describe what shares they own and their responsibilities for efficiently managing the business.

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*Start writing here..*

## Mission statement

 Help tip

 Health Coaching Business Plan

Summarize your business' objective, core principles, and values in your mission statement. This statement needs to be memorable, clear, and brief.

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**Empowering individuals to achieve their best selves through a holistic approach to wellness, intertwining mind, body, and soul."**

**At [Holistic Health Haven], our mission reverberates in every aspect of our service, striving for the holistic well-being of our clients and making a positive change in their lives.**




## Business history

 Help tip

 Health Coaching Business Plan

If you're an established health coaching service provider, briefly describe your business history, like—when it was founded, how it evolved over time, etc.

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*Start writing here..*

## Future goals

 Help tip

 Health Coaching Business Plan

It's crucial to convey your aspirations and vision. Mention your short-term and long-term goals; they can be specific targets for revenue, market share, or expanding your services.

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*Start writing here..*

# 3.

## Market Analysis

Target Market

Market size and growth potential

Competitive analysis

Market trends

Regulatory environment



## REMEMBER

Market analysis provides a clear understanding of the market in which your printing business will run along with the target market, competitors, and growth opportunities.

To unlock help try Upmetrics!

### Help tip

### Health Coaching Business Plan

To write the introduction section of your market analysis, start by clearly identifying your primary target market.

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## Target Market

### Help tip

### Health Coaching Business Plan

Start this section by describing your target market. Define your ideal customer and explain what types of services they prefer. Creating a buyer persona will help you easily define your target market to your readers.

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## Market size and growth potential

### Help tip

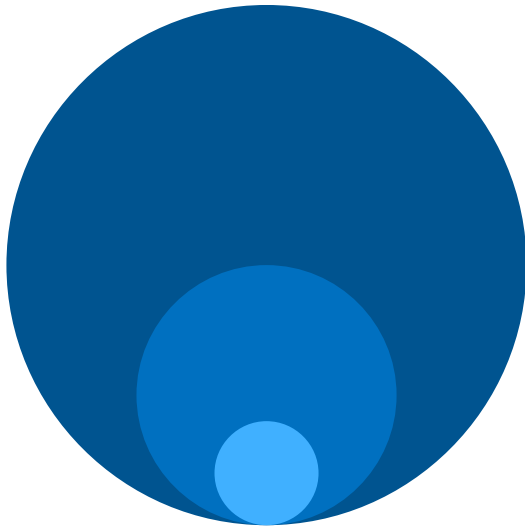
### Health Coaching Business Plan

Describe your market size and growth potential and whether you will target a niche or a much broader market.

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*Start writing here..*

## Market Size



### Available Market

All individuals seeking holistic health services in the country.

100M

### Served Market

Those within urban areas with access to holistic health centers.


50M

### Target Market

Busy urban professionals aged 30-50 seeking tailored health coaching.

20M

 Help tip

 Health Coaching Business Plan

Identify and analyze your direct and indirect competitors. Identify their strengths and weaknesses, and describe what differentiates your health coaching services from them.

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## Competitive analysis

### Wellness Wonders

Wellness Wonders, established in [2010], has steadily climbed the ranks in the holistic health coaching domain. They pride themselves on their integration of modern health tech tools with traditional wellness practices.

#### Features

Personalized nutrition and diet plans using AI technology.

Virtual meditation and mindfulness sessions.

On-demand fitness and exercise programs.

Bi-monthly workshops on stress management techniques.

#### Strengths

Strong online presence with a user-friendly mobile app.

Broad service offerings covering diverse aspects of holistic health.

Partnership with leading health tech companies for innovative solutions.

#### Weaknesses

Limited physical locations, reducing in-person interactions.

A relatively high price point may deter budget-conscious customers.

Feedback suggests a lack of personalized human touch due to heavy reliance on technology.

## Holistic Harmony

Holistic Harmony has been in the industry since [2005], focusing on blending ancient health philosophies with contemporary wellness needs. They boast a large clientele, predominantly in the [40-60] age bracket.

### Features

Traditional Ayurveda-based health assessments.

Customized yoga and meditation retreats.

Workshops on ancient healing techniques and philosophies.

Personal health coaching sessions.

### Strengths

Deep-rooted credibility owing to their long-standing presence.

Unique offerings like Ayurveda attract a niche clientele.

Extensive physical locations for immersive retreats and sessions.

### Weaknesses

Limited technological integration, making remote sessions challenging.

Predominantly caters to an older demographic, missing out on younger audiences.

Slow to adapt to the rapidly changing health and wellness trends.

## Market trends

 **Help tip**

 **Health Coaching Business Plan**


Analyze emerging trends in the industry, such as technology disruptions, changes in customer behavior or preferences, etc. Explain how your business will cope with all the trends.

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*Start writing here..*

## Regulatory environment

 **Help tip**

 **Health Coaching Business Plan**

List regulations and licensing requirements that may affect your health coaching company, such as licensing & certification, insurance coverage, privacy & confidentiality, scope of practice, etc.

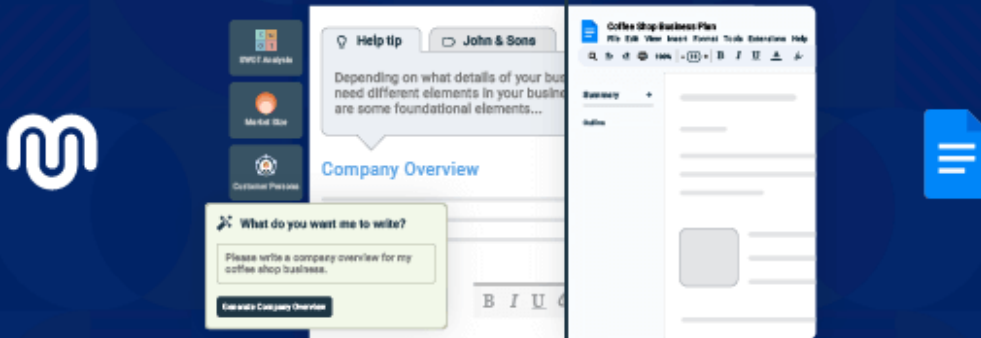
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# Upmetrics vs Business Plan Templates

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.

[Start your planning today](#)

# 4.

## Products and Services

Services

Approach

Expertise

Additional Services



## REMEMBER

The product and services section of a health coaching business plan should describe the specific services and products that will be offered to customers. To write this section should include the following:

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### Help tip

### Health Coaching Business Plan

To craft the introduction for your "Products and Services" chapter, begin by positioning your business within its industry, emphasizing its unique strengths or value proposition.

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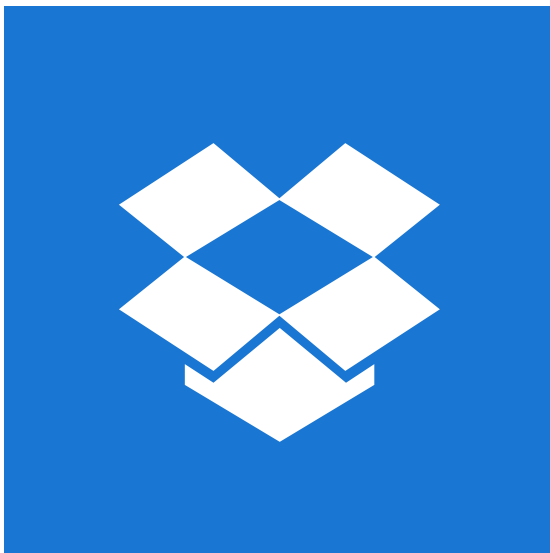
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### Help tip

Mention the health coaching services your business will offer. This list may include services like,

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## Services



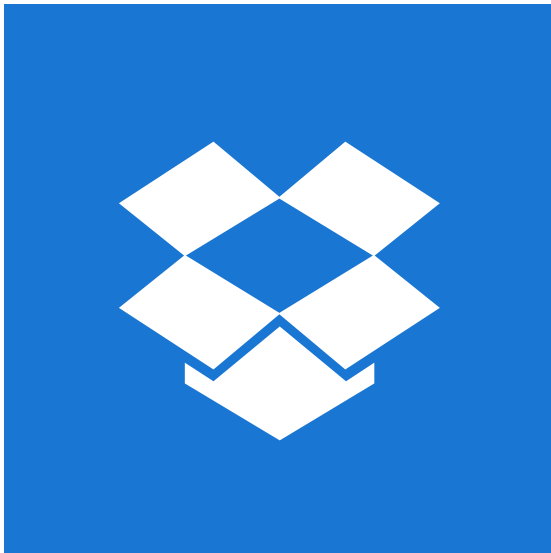
### Personalized Health Plans

Price: **[\$150/month]**

Tailored health plans created based on individual needs, taking into account factors like current lifestyle, health history, and personal goals.

#### Specifications

- Duration: Plan spans 30 days with weekly updates.
- Components: Nutritional advice, exercise regimen, stress management techniques, and sleep recommendations.
- Follow-ups: Weekly email check-ins.



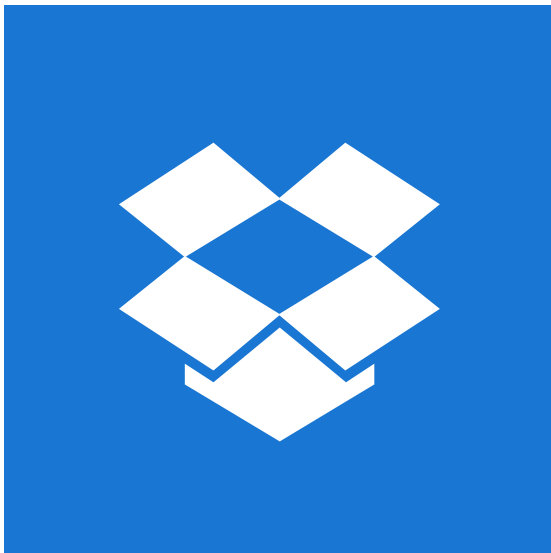
## Initial Assessment and Goal Setting

Price: **[\$50/session]**

A comprehensive 60-minute intake session to evaluate current health status and set clear, measurable objectives.

### Specifications

- Duration: 60 minutes.
- Components: Health questionnaire, physical assessment, lifestyle evaluation.
- Deliverables: A summarized report of current health status and set objectives.



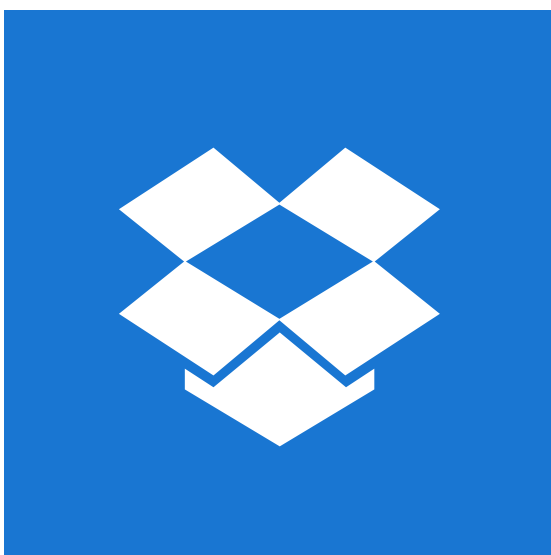
## Individual Coaching Sessions

Price: **[\$80/session]**

One-on-one sessions with our certified coaches to delve deep into specific health concerns and challenges.

### Specifications

- Duration: 45 minutes.
- Mode: In-person or virtual (via video call).
- Frequency: As required, typically weekly or bi-weekly.



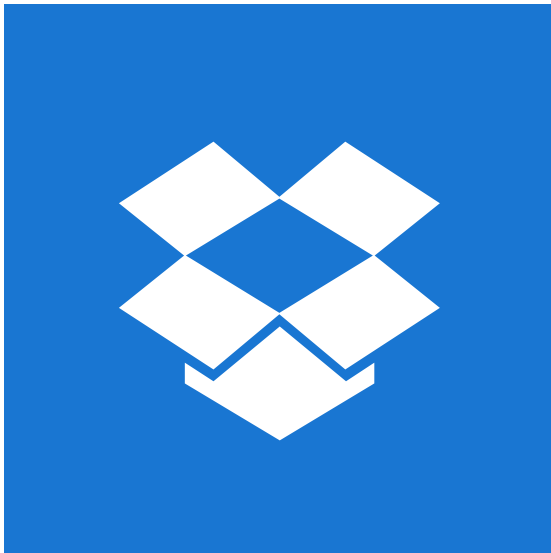
## Progress Monitoring and Adjustments

Price: **Included with Personalized Health Plans.**

Regular evaluations to track progress and modify the health plan if needed.

### Specifications

- Duration: 30 minutes.
- Frequency: Monthly.
- Deliverables: Progress report with updates and recommended plan adjustments.



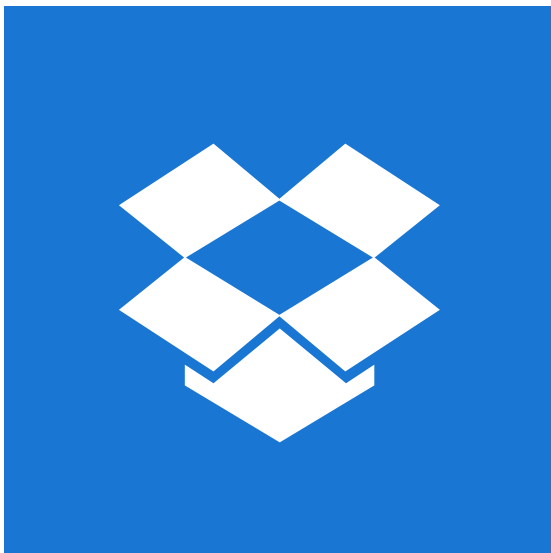
## Group Programs & Workshops

Price: **[\$30/person] for each workshop.**

Community-based sessions covering various health topics, fostering shared learning and mutual support.

### Specifications

- Duration: 2 hours.
- Topics: Vary monthly, examples include "Mindful Eating," "Yoga for Stress Relief," etc.
- Participants: Maximum 20 persons per session.



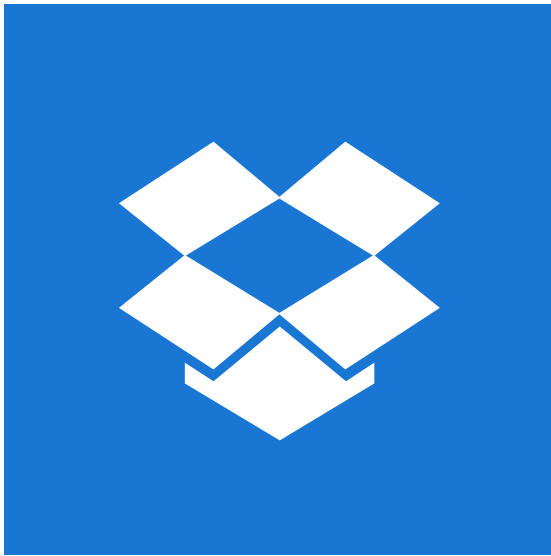
## Meal Planning

Price: **[\$60/month]**

Customized meal plans crafted to ensure balanced nutrition while catering to individual dietary needs and preferences.

### Specifications

- 
- Duration: Plan spans 30 days.
- Components: Weekly menus, grocery lists, and preparation guidelines.
- Dietary Options: Vegan, gluten-free, low-carb, and more.



## Educational Workshops


Price: **[\$25/person] for each workshop.**


Informative sessions on various aspects of health and well-being.

### Specifications

- Duration: 1.5 hours.
- Topics: Examples include "The Science of Sleep," "Meditation Basics," etc.
- Participants: Maximum 25 persons per session.

## Approach

 **Help Tip**

 **Health Coaching Business Plan**

Describe the strategy and process you employ in your coaching practice. Highlight the guiding principles, philosophies, or methods used in your coaching.

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*Start writing here..*

## Expertise

 **Help tip**

 **Health Coaching Business Plan**


Draw attention to the areas of your expertise and any training or certificates you may have. For instance, if you have a specialty in prenatal health, stress treatment, or weight management, describe your training and expertise in these fields.

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*Start writing here..*

## Additional Services

 **Help tip**

 **Health Coaching Business Plan**

Mention if your health coaching company offers any additional services. You may include services like, meal planning, educational workshops, etc.

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*Start writing here..*

# 5.

## Sales And Marketing Strategies

Unique Selling Proposition (USP)

Pricing Strategy

Marketing strategies

Sales strategies

Customer retention





## REMEMBER

Writing the sales and marketing strategies section means a list of strategies you will use to attract and retain your clients.

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## Help Tip

## Health Coaching Business Plan

To create an effective introduction for your "Sales and Marketing Strategies" chapter, start by setting the stage within your specific industry or market.

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*Start writing here..*

## Unique Selling Proposition (USP)

## Help tip

## Health Coaching Business Plan

Define your business's USPs depending on the market you serve, the equipment you use, and the unique services you provide. Identifying USPs will help you plan your marketing strategies.

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*Start writing here..*

## Pricing Strategy

## Help tip

## Health Coaching Business Plan

Describe your pricing strategy—how you plan to price your services and stay competitive in the local market. You can mention any discounts you plan on offering to attract new customers.

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*Start writing here..*

Discuss your marketing strategies to market your services. You may include some of these marketing strategies in your business plan—social media marketing, Google ads, brochures, email marketing, content marketing, and print marketing.

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## Marketing strategies

### Online



#### Social Media

Regular content updates on platforms like Instagram, Facebook, and LinkedIn highlighting our services, success stories, and health tips.



#### Email Marketing

Monthly newsletters offering health insights, special promotions, and news about our services.



#### Content Marketing

Blog posts and articles addressing common health concerns and the benefits of holistic health to drive organic traffic to our website.



#### Google Ads

Targeted pay-per-click campaigns to capture those actively seeking health coaching services.

### Offline



#### Brochures & Print Marketing

Distributed in local health stores, gyms, and community centers to capture local clientele.

Outline the strategies you'll implement to maximize your sales. Your sales strategies may include direct sales calls, partnering with other businesses, offering referral programs, etc.

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## Sales strategies



### Partner with Businesses

Collaborating with local gyms, yoga studios, and wellness centers to offer combined packages.



### Direct Sales Calls

Regularly reaching out to potential clients who've expressed interest or those identified through market research.



### Referral Programs

Offering incentives to existing clients for referring our services to friends and family.

Describe your customer retention strategies and how you plan to execute them. For instance, introducing loyalty programs, discounts on annual membership, personalized service, etc.

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## Customer retention



### Loyalty Programs

Repeat clients can earn points with each session, which can be redeemed for free sessions or discounts.



### Annual Membership Discounts

Clients opting for an annual membership get exclusive discounts and benefits.



### Personalized Service

Customized health plans, regular check-ins, and adjustments based on individual progress to ensure our clients always feel valued.

# 6.

## Operations Plan

Staffing & Training

Operational Process

Equipment & Software



## REMEMBER

When writing the operations plan section, it's important to consider the various aspects of your business operations.

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### Help tip

### Health Coaching Business Plan

To create an effective introduction for your "Operational Plan" chapter, start by emphasizing the pivotal role of efficient operations in the success of your business, underscoring how they directly impact the quality of services delivered.

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*Start writing here..*

## Staffing & Training

### Help tip

### Health Coaching Business Plan

Mention your cleaning business's staffing requirements, including the number of employees or health coaches needed. Include their qualifications, the training required, and the duties they will perform.

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*Start writing here..*

## Operational Process

### Help tip

### Health Coaching Business Plan

Outline the processes and procedures you will use to run your health coaching business. Your operational processes may include client intake & assessment, goal setting & action planning, progress tracking & evaluation, etc.

To unlock help try Upmetrics!

*Start writing here..*

## Equipment & Software

 **Help tip**

 **Health Coaching Business Plan**

Include the list of equipment and machinery required for health coaching, such as laptops, scanners & printers, client management software, online scheduling software, etc.

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*Start writing here..*

# 7.

## Management Team

Key managers

Organizational structure

Compensation plan

Board of advisors



## REMEMBER

The management team section provides an overview of the individuals responsible for running your business plan.

To unlock help try Upmetrics!

### Help tip

### Health Coaching Business Plan

To craft an introduction for your "Management Team" chapter, begin by emphasizing the crucial role of leadership in the success of any business.

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Start writing here..

## Key managers

### Help tip

### Health Coaching Business Plan

Introduce your management and key members of your team, and explain their roles and responsibilities.

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Start writing here..



### John Doe

CEO - [john.doe@example.com](mailto:john.doe@example.com)

With over two decades of experience in the health and wellness industry, John has been the driving force behind the establishment and subsequent growth of [Holistic Health Haven].



- Educational Background: John holds an MBA from Harvard Business School and a Bachelor's degree in Nutrition from Stanford University.
- Professional Background: John began his career as a nutritionist, later founding several wellness startups before establishing [Holistic Health Haven].

His strategic foresight and leadership qualities have been instrumental in shaping the trajectory of our business.





## Jane Do

Chief Operating Officer (COO) - [jane.doe@example.com](mailto:jane.doe@example.com)

Jane, with her keen sense of operational excellence, ensures that our day-to-day activities run seamlessly, delivering the best value to our clients.



- Educational Background: Jane holds a Master's degree in Health Management from the University of California and a Bachelor's degree in Organizational Leadership from Yale.
- Professional Background: Before joining [Holistic Health Haven], Jane served as the Operations Director at [Previous Health Company], where she was pivotal in restructuring their service delivery processes.



## Alice Brown

CMO - [alice.brown@example.com](mailto:alice.brown@example.com)

Alice steers our marketing efforts, ensuring that the unique value proposition of [Holistic Health Haven] is communicated effectively to our target audience.



- Educational Background: Alice earned her Master's in Marketing from Wharton School of Business and holds a Bachelor's in Communications from Cornell University.
- Professional Background: Alice's marketing expertise was honed at [Previous Wellness Brand], where she served as the Vice President of Marketing. Her innovative strategies led to a 40% increase in brand visibility in just two years.



## Robert Brown

Operations Manager - [robert.brown@example.com](mailto:robert.brown@example.com)

Robert ensures the efficient functioning of our health coaching sessions and consistently delivers a superior client experience.



- Educational Background: Robert has a Bachelor's degree in Business Management from the University of Michigan.
- Professional Background: Robert previously served as the Service Delivery Manager at [Another Health Company], where he successfully managed a team of over 50 health coaches.

# Organizational structure

 **Help tip**

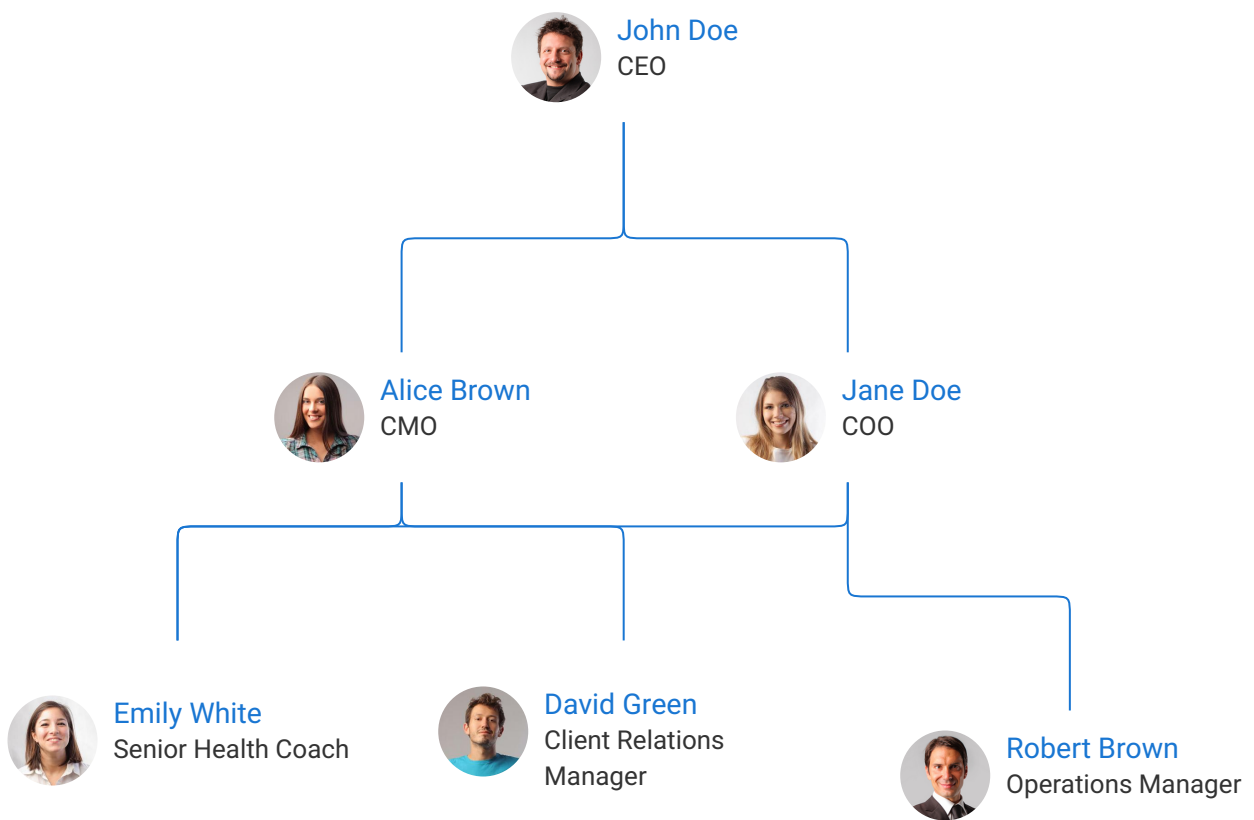
 **Health Coaching Business Plan**

Explain the organizational structure of your management team. Include the reporting line and decision-making hierarchy.

To unlock help try Upmetrics! 


*Start writing here..*

## Organization chart



## Compensation plan

 **Help tip**


 **Health Coaching Business Plan**

Describe your compensation plan for the management and staff. Include their salaries, incentives, and other benefits.

To unlock help try Upmetrics! 

*Start writing here..*

## Board of advisors

 **Help tip**

Mentioning advisors or consultants in your business plans adds credibility to your business idea.

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*Start writing here..*



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### **Dr. Michael Smith**

Advisor

Dr. Michael Smith is having vast experience in [specific fields].

# 8.

## Financial Plan

Profit & loss statement

Cash flow statement

Balance sheet

Break-even Analysis

Financing needs



### REMEMBER

When writing the financial plan section of a business plan, it's important to provide a comprehensive overview of your financial projections for the first few years of your business, You may provide the following:

To unlock help try Upmetrics!

### Help tip

### Health Coaching Business Plan

To create an effective introduction for your "Financial Plan" chapter, begin by stressing the critical role of a well-structured financial plan in the success of your venture.

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*Start writing here..*

### Help tip

Describe details such as projected revenue, operational costs, and service costs in your projected profit and loss statement. Make sure to include your business's expected net profit or loss.

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## Profit & loss statement

	2024	2025	2026
<b>Revenue</b>	<b>\$661,221.10</b>	<b>\$1,798,584</b>	<b>\$2,898,785.30</b>
General Health and Wellness Coaching	\$236,463.50	\$614,785.60	\$934,462.10

	2024	2025	2026
Users	271	493	686
Recurring Charges	\$130	\$130	\$130
<b>Nutrition and Diet Coaching</b>	<b>\$162,824</b>	<b>\$502,916</b>	<b>\$929,520</b>
Users	257	567	967
Recurring Charges	\$100	\$100	\$100
<b>Fitness and Exercise Coaching</b>	<b>\$261,933.60</b>	<b>\$680,882.40</b>	<b>\$1,034,803.20</b>
Users	325	591	822
Recurring Charges	\$120	\$120	\$120
<b>Cost Of Sales</b>	<b>\$76,861.07</b>	<b>\$134,323.22</b>	<b>\$189,945.16</b>
General Costs	\$76,861.07	\$134,323.22	\$189,945.16
Exercise Equipment	\$57,061.07	\$113,929.22	\$168,939.28
Treadmills	\$24,000	\$24,000	\$24,000
Yoga Mats	\$33,061.07	\$89,929.22	\$144,939.28
Health Supplements	\$19,800	\$20,394	\$21,005.88


	2024	2025	2026
Protein Shakes	\$18,000	\$18,540	\$19,096.20
Vitamins	\$1,800	\$1,854	\$1,909.68
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
<b>Gross Margin</b>	<b>\$584,360.03</b>	<b>\$1,664,260.78</b>	<b>\$2,708,840.14</b>
<b>Gross Margin (%)</b>	<b>88.38%</b>	<b>92.53%</b>	<b>93.45%</b>
<b>Operating Expense</b>	<b>\$789,061.07</b>	<b>\$870,124.22</b>	<b>\$950,132.33</b>
Payroll Expense (Indirect Labor)	\$702,000	\$724,875	\$748,515.84
Coaching Staff	\$390,000	\$403,200	\$416,856
General Wellness Coaches	\$240,000	\$247,200	\$254,616
Nutrition Specialists	\$150,000	\$156,000	\$162,240
Administrative Staff	\$141,000	\$144,690	\$148,479.96
Office Manager	\$87,000	\$89,610	\$92,298.36

	<b>2024</b>	<b>2025</b>	<b>2026</b>
Receptionist	\$54,000	\$55,080	\$56,181.60
Specialized Staff	\$171,000	\$176,985	\$183,179.88
Fitness Trainers	\$171,000	\$176,985	\$183,179.88
General Expense	\$87,061.07	\$145,249.22	\$201,616.48
Facility Costs	\$36,000	\$36,780	\$37,577.40
Rent	\$30,000	\$30,600	\$31,212
Utilities	\$6,000	\$6,180	\$6,365.40
Marketing and Advertising	\$45,061.07	\$102,169.22	\$157,424.08
Online Advertising	\$33,061.07	\$89,929.22	\$144,939.28
Print and Media Advertising	\$12,000	\$12,240	\$12,484.80
Operational Expenses	\$6,000	\$6,300	\$6,615
Insurance	\$3,600	\$3,780	\$3,969
Software Subscriptions	\$2,400	\$2,520	\$2,646
Bad Debt	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0




	2024	2025	2026
<b>EBITDA</b>	<b>(\$204,701.04)</b>	<b>\$794,136.56</b>	<b>\$1,758,707.80</b>
<b>Additional Expense</b>	<b>\$8,488.93</b>	<b>\$6,554.77</b>	<b>\$4,501.31</b>
Long Term Depreciation	\$3,342	\$3,342	\$3,342
Gain or loss from Sale of Assets	\$0	\$0	\$0
<b>EBIT</b>	<b>(\$208,043.04)</b>	<b>\$790,794.56</b>	<b>\$1,755,365.80</b>
Interest Expense	\$5,146.94	\$3,212.76	\$1,159.29
<b>EBT</b>	<b>(\$213,189.97)</b>	<b>\$787,581.79</b>	<b>\$1,754,206.49</b>
Income Tax Expense / Benefit	\$0	\$0	\$0
<b>Total Expense</b>	<b>\$874,411.07</b>	<b>\$1,011,002.21</b>	<b>\$1,144,578.81</b>
<b>Net Income</b>	<b>(\$213,189.97)</b>	<b>\$787,581.79</b>	<b>\$1,754,206.49</b>
<b>Net Income (%)</b>	<b>(32.24%)</b>	<b>43.79%</b>	<b>60.52%</b>
Retained Earning Opening	\$0	(\$231,189.97)	\$538,391.82

	2024	2025	2026
Owner's Distribution	\$18,000	\$18,000	\$18,000
<b>Retained Earning Closing</b>	<b>(\$231,189.97)</b>	<b>\$538,391.82</b>	<b>\$2,274,598.31</b>

 **Help tip**

The cash flow for the first few years of your operation should be estimated and described in this section. This may include billing invoices, payment receipts, loan payments, and any other cash flow statements.

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## Cash flow statement

	2024	2025	2026
<b>Cash Received</b>	<b>\$661,221.10</b>	<b>\$1,798,584</b>	<b>\$2,898,785.30</b>
<b>Cash Paid</b>	<b>\$871,069.07</b>	<b>\$1,007,660.20</b>	<b>\$1,141,236.81</b>
COS & General Expenses	\$163,922.14	\$279,572.43	\$391,561.66
Salary & Wages	\$702,000	\$724,875	\$748,515.84
Interest	\$5,146.94	\$3,212.76	\$1,159.29
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0

	2024	2025	2026
<b>Net Cash From Operations</b>	<b>(\$209,847.97)</b>	<b>\$790,923.80</b>	<b>\$1,757,548.49</b>
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$20,500	\$0	\$0
<b>Net Cash From Investments</b>	<b>(\$20,500)</b>	<b>\$0</b>	<b>\$0</b>
<b>Amount Received</b>	<b>\$150,000</b>	<b>\$0</b>	<b>\$0</b>
Loan Received	\$100,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$50,000	\$0	\$0
<b>Amount Paid</b>	<b>\$49,359.35</b>	<b>\$51,293.51</b>	<b>\$53,347.12</b>
Loan Capital	\$31,359.34	\$33,293.52	\$35,347.14
Dividends & Distributions	\$18,000	\$18,000	\$18,000
<b>Net Cash From Financing</b>	<b>\$100,640.65</b>	<b>(\$51,293.51)</b>	<b>(\$53,347.12)</b>

2024

2025

2026

**Summary**

Starting Cash	\$0	(\$129,707.32)	\$609,922.97
Cash In	\$811,221.10	\$1,798,584	\$2,898,785.30
Cash Out	\$940,928.42	\$1,058,953.71	\$1,194,583.93
Change in Cash	(\$129,707.32)	\$739,630.29	\$1,704,201.37
<b>Ending Cash</b>	<b>(\$129,707.32)</b>	<b>\$609,922.97</b>	<b>\$2,314,124.34</b>

**Help tip**

Create a projected balance sheet documenting your health coaching business's assets, liabilities, and equity.

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**Balance sheet**

2024

2025

2026

<b>Assets</b>	<b>(\$112,549.32)</b>	<b>\$623,738.97</b>	<b>\$2,324,598.34</b>
<b>Current Assets</b>	<b>(\$129,707.32)</b>	<b>\$609,922.97</b>	<b>\$2,314,124.34</b>

	2024	2025	2026
Cash	(\$129,707.32)	\$609,922.97	\$2,314,124.34
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
<b>Long Term Assets</b>	<b>\$17,158</b>	<b>\$13,816</b>	<b>\$10,474</b>
Gross Long Term Assets	\$20,500	\$20,500	\$20,500
Accumulated Depreciation	(\$3,342)	(\$6,684)	(\$10,026)
<b>Liabilities &amp; Equity</b>	<b>(\$112,549.31)</b>	<b>\$623,738.96</b>	<b>\$2,324,598.31</b>
<b>Liabilities</b>	<b>\$68,640.66</b>	<b>\$35,347.14</b>	<b>\$0</b>
<b>Current Liabilities</b>	<b>\$33,293.52</b>	<b>\$35,347.14</b>	<b>\$0</b>
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$33,293.52	\$35,347.14	\$0
<b>Long Term Liabilities</b>	<b>\$35,347.14</b>	<b>\$0</b>	<b>\$0</b>
Long Term Debt	\$35,347.14	\$0	\$0


	2024	2025	2026
<b>Equity</b>	<b>(\$181,189.97)</b>	<b>\$588,391.82</b>	<b>\$2,324,598.31</b>
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	(\$231,189.97)	\$538,391.82	\$2,274,598.31
<b>Check</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

 **Help tip**

 **Health Coaching Business Plan**

Determine and mention your business's break-even point—the point at which your business costs and revenue will be equal.

This exercise will help you understand how much revenue you need to generate to sustain or be profitable.

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## Break-even Analysis

	2024	2025	2026
Starting Revenue	\$0	\$661,221.10	\$2,459,805.10

	2024	2025	2026
Net Revenue	\$661,221.10	\$1,798,584	\$2,898,785.30
<b>Closing Revenue</b>	<b>\$661,221.10</b>	<b>\$2,459,805.10</b>	<b>\$5,358,590.40</b>
Starting Expense	\$0	\$874,411.07	\$1,885,413.28
Net Expense	\$874,411.07	\$1,011,002.21	\$1,144,578.81
<b>Closing Expense</b>	<b>\$874,411.07</b>	<b>\$1,885,413.28</b>	<b>\$3,029,992.09</b>
<b>Is Break Even?</b>	<b>No</b>	<b>Yes</b>	<b>Yes</b>
<b>Break Even Month</b>	<b>0</b>	<b>Jun '25</b>	<b>0</b>
<b>Days Required</b>	<b>0</b>	<b>2 Days</b>	<b>0</b>
<b>Break Even Revenue</b>	<b>\$874,411.07</b>	<b>\$1,286,660.79</b>	<b>\$0</b>
General Health and Wellness Coaching	\$0	\$454,034.27	\$0
Nutrition and Diet Coaching	\$0	\$329,716.20	\$0
Fitness and Exercise Coaching	\$0	\$502,910.32	\$0
<b>Break Even Units</b>			


	2024	2025	2026
General Health and Wellness Coaching	0	370	0
Nutrition and Diet Coaching	0	380	0
Fitness and Exercise Coaching	0	444	0

## Financing needs

 Help tip

 Health Coaching Business Plan

Calculate costs associated with starting a health coaching business, and estimate your financing needs and how much capital you need to raise to operate your business.

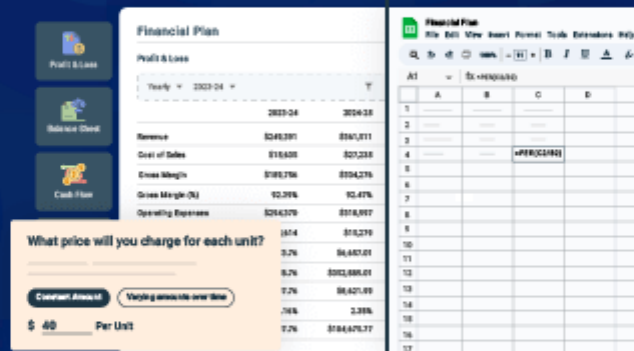
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*Start writing here..*



# 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 pop-up window asks 'What price will you charge for each unit?' with a 'Comment Ahead' button and a 'View previous data view' link. Below this, a table shows unit price changes and their impact on revenue and profit.

	2023-24	2024-25
Revenue	\$245,391	\$161,811
Cost of Sales	\$18,608	\$27,238
Gross Margin	\$192,776	\$134,276
Gross Margin (%)	78.5%	83.0%
Operating Expenses	\$294,329	\$318,957
	1814	\$15,239
	3.2%	\$6,657.01
	0.2%	\$202,895.01
	7.2%	\$6,621.00
	.78%	3.38%
	7.2%	\$184,675.77

On the right is a standard spreadsheet interface, showing a grid with formulas like '=PERC(100)' and a search bar. It appears more cluttered and technical.



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](#)

9.

Appendix



**REMEMBER**

When writing the appendix section, you should include any additional information that supports the main content of your plan. This may include financial statements, market research data, legal documents, and other relevant information.

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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.

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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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