



# Ice Cream Truck Business Plan

# BUSINESS PLAN

Joyful Ice Cream Journeys



## Prepared By

 John Doe

 (650) 359-3153

 10200 Bolsa Ave, Westminster, CA, 92683

 info@example.com

 <http://www.example.com>

# Table of Contents

<b>Executive Summary</b>	<b>6</b>
Market opportunity .....	7
Services Offered .....	7
Marketing and Sales Strategies .....	8
Financial Highlights .....	8
Units Sold v/s Revenue .....	9
<b>Company Overview</b>	<b>10</b>
Ownership .....	11
Mission statement .....	12
Business history .....	12
Future goals .....	12
<b>Market Analysis</b>	<b>13</b>
Target Market .....	14
Market size and growth potential .....	14
Market Size .....	15
Competitive analysis .....	15
Sweet Treats on Wheels .....	15
Frozen Delights Express .....	16
Ice Cream Adventure .....	16
Market trends .....	16
Regulatory environment .....	17
<b>Products and Services</b>	<b>18</b>
Products .....	19
Classic Ice Cream Cones .....	20
Ice Cream Bars & Popsicles .....	21
Soft Serve Ice Cream .....	21
Gourmet Ice Cream .....	22
Sundaes .....	22

Product Sourcing .....	23
Additional Services .....	23

## Sales And Marketing Strategies 24

Unique Selling Proposition (USP) .....	25
Pricing Strategy .....	25
Marketing strategies .....	26
Online .....	26
Offline .....	26
Sales strategies .....	27
Customer retention .....	28

## Operations Plan 29

Staffing & Training .....	30
Operational Process .....	30
Equipment & Machinery .....	31

## Management Team 32

Key managers .....	33
John Doe .....	33
Jane Doe .....	34
Alice Brown .....	34
Robert Brown .....	35
Organizational structure .....	35
Organization chart .....	36
Compensation plan .....	36
Advisors/Consultants .....	37
[ADVISOR NAME] .....	37

## Financial Plan 38

Profit & loss statement .....	39
Cash flow statement .....	44
Balance sheet .....	46

Break-even Analysis .....

48

Financing needs .....

50

Appendix

52

---

# 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.

Upmetrics has everything you need to create a comprehensive business plan.



## AI-powered Upmetrics Assistant

### AI-powered insights to streamline your plan

Not sure where to start? Upmetrics' AI Assistant will automatically generate ideas for each section of your plan and offer improved versions of your writing, adjusting for tone, voice, and grammar or spelling errors.

## Financial Forecasting Tool

### All the financials are calculated for you

Forget the complex formulas and clumsy spreadsheets — with automatic financials and drag-and-drop forecasting, you can finish your plan faster and be confident that your numbers are accurate.



## Business Plan Builder

### Guides you like a business mentor

Upmetrics' step-by-step instructions, prompts, and the library of 400+ sample business plans will guide you through each section of your plan as a business mentor.

Join over 110K entrepreneurs who trust **Upmetrics with Business Planning**

Create a comprehensive business plan and maximize your chances of securing funding, bank loans, and small business grants.

Create your business plan today

15-day money-back guarantee

# 1.

## Executive Summary

Market opportunity

Services Offered

Marketing and 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

### Ice Cream Truck Business Plan

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

This section may include the name of your ice cream truck business, its location, when it was

To unlock help try Upmetrics!

*Start writing here..*

## Market opportunity

### Help tip

### Ice Cream Truck 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.

To unlock help try Upmetrics!

*Start writing here..*

## Services Offered

### Help tip

### Ice Cream Truck Business Plan


Highlight the products you offer to your clients. The USPs and differentiators you offer are always a plus.

To unlock help try Upmetrics!

*Start writing here..*

## Marketing and Sales Strategies

 **Help tip**

 **Ice Cream Truck 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**

 **Ice Cream Truck Business Plan**

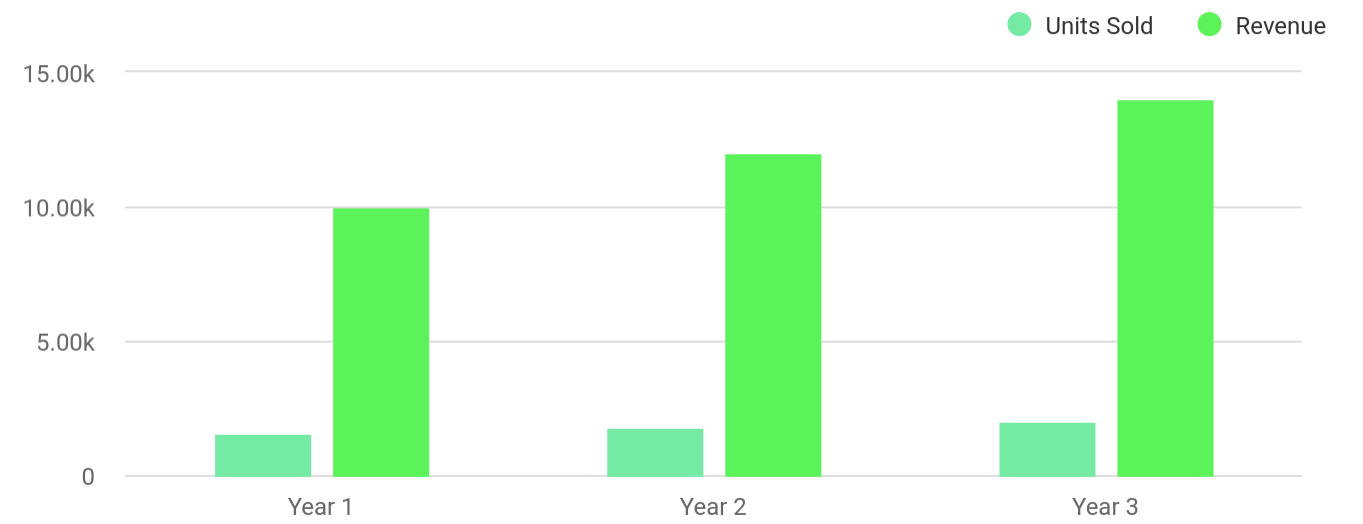
Briefly summarize your financial projections for the initial years of business operations. Include any capital or investment requirements, associated startup costs, projected revenues, and profit forecasts.

To unlock help try Upmetrics! 

*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

Ice Cream Truck Business Plan

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

To unlock help try Upmetrics!

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.

To unlock help try Upmetrics!

#### Help tip

#### Ice Cream Truck Business Plan

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

Describe what kind of ice cream truck you run and the name of it. You may specialize in one of

To unlock help try Upmetrics!

*Start writing here..*

## Ownership

#### Help tip

#### Ice Cream Truck Business Plan

List the names of your ice cream truck company's founders or owners. Describe what shares they own and their responsibilities for efficiently managing the business.

To unlock help try Upmetrics!

*Start writing here..*

## Mission statement

💡 Help tip

📄 Ice Cream Truck Business Plan

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

To unlock help try Upmetrics! 🔒



**At [Chill on Wheels], we bring joy and sweetness to every corner of [Location], serving up an array of high-quality, innovative frozen treats with a side of smiles and exceptional service.**

**We believe in creating memorable moments, fostering community connections, and ensuring that every customer leaves with a treat in hand and happiness in their heart.**



## Business history

💡 Help tip

📄 Ice Cream Truck Business Plan

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

To unlock help try Upmetrics! 🔒

*Start writing here..*

## Future goals

💡 Help tip

📄 Ice Cream Truck 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.

To unlock help try Upmetrics! 🔒

*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

### Ice Cream Truck Business Plan

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

To unlock help try Upmetrics!

*Start writing here..*

## Target Market

### Help tip

### Ice Cream Truck 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.

To unlock help try Upmetrics!

*Start writing here..*

## Market size and growth potential

### Help tip

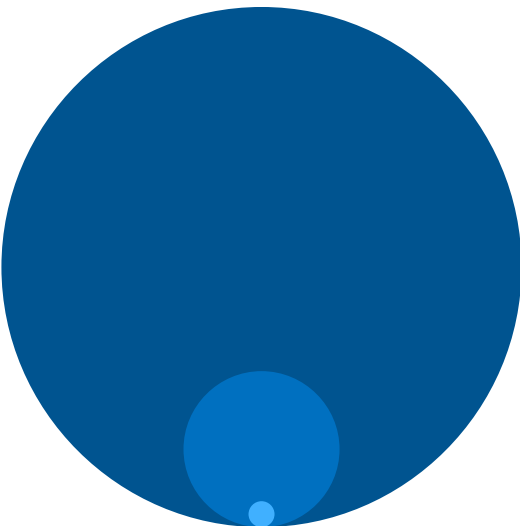
### Ice Cream Truck Business Plan

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

To unlock help try Upmetrics!

*Start writing here..*

## Market Size



### Available Market

Includes everyone in [Location] who purchases ice cream.

1M

### Served Market

Residents and workers in our specific service areas.

300k

### Target Market

Families, young adults, and corporate employees in key locations.

50k



Help tip



Ice Cream Truck Business Plan

Identify and analyze your direct and indirect competitors. Identify their strengths and weaknesses, and describe what differentiates your ice cream truck business from them.

To unlock help try Upmetrics!

## Competitive analysis

### Sweet Treats on Wheels

Sweet Treats on Wheels has been a popular choice in the [City/Area Name] for over a decade. They offer a wide variety of ice creams, including classic flavors and seasonal specialties. They operate in parks, community events, and are available for private parties.

#### Features

- Extensive menu with over 50 flavors
- Seasonal and holiday specials
- Catering services for private events

#### Strengths

- Well-established brand with a loyal customer base
- Strong presence in community events
- Extensive menu catering to all age groups

#### Weaknesses

- Limited innovation in terms of flavors or serving methods
- Older truck models, which might be less appealing to younger demographics
- Heavily reliant on seasonal business

## Frozen Delights Express

Frozen Delights Express is known for its quick service and prime location choices. They operate newer, more modern trucks and focus heavily on high-traffic areas.


Features	Strengths	Weaknesses
<div>Fast service, even during peak hours</div> <div>Modern, visually appealing trucks</div> <div>Strategic location planning for maximum visibility</div>	<div>Efficient service, especially appreciated during busy hours</div> <div>High visibility leads to increased impulse purchases</div> <div>Modern trucks provide a fresh and clean image</div>	<div>Limited menu options</div> <div>Less focus on community engagement, which might impact customer loyalty</div> <div>Higher operating costs due to the need for newer trucks and prime locations</div>


## Ice Cream Adventure

Ice Cream Adventure focuses on providing a unique experience with their gourmet and artisanal ice cream flavors. They are popular among foodies and those looking for a premium ice cream experience.


Features	Strengths	Weaknesses
<div>Gourmet and artisanal ice cream flavors</div> <div>Premium pricing for a premium product</div> <div>Strong branding focused on quality and uniqueness</div>	<div>Unique product offering in the market</div> <div>Strong branding that appeals to a niche market</div> <div>Ability to charge premium prices</div>	<div>Less appeal to the mass market or budget-conscious consumers</div> <div>Limited product offerings might not appeal to children or traditional ice cream lovers</div> <div>Higher production costs due to premium ingredients</div>

## Market trends

 Help tip

 Ice Cream Truck Business Plan

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

To unlock help try Upmetrics! 

Start writing here..



# Regulatory environment

Help tip

Ice Cream Truck Business Plan

List regulations and licensing requirements that may affect your ice cream truck company, such as licensing & permits, health & safety regulations, insurance, etc.

To unlock help try Upmetrics!

Start writing here..

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.

SWOT Analysis

Market Size

Customer Profiles

Help tip

John & Sons

Coffee Shop Business Plan

File Edit View Insert Format Tools Extensions Help

Summary

Outline

What do you want me to write?

Please write a company overview for my coffee shop business.

Create Company Overview

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

Ice Cream Truck Business Plan | Business Plan 2023

17/54

# 4.

## Products and Services

Products

Product Sourcing

Additional Services



## REMEMBER

The product and services section of the ice cream truck business plan should describe the specific services and products offered to customers. To write this section should include the following:

To unlock help try Upmetrics!

## Help tip

## Ice Cream Truck 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.

To unlock help try Upmetrics!

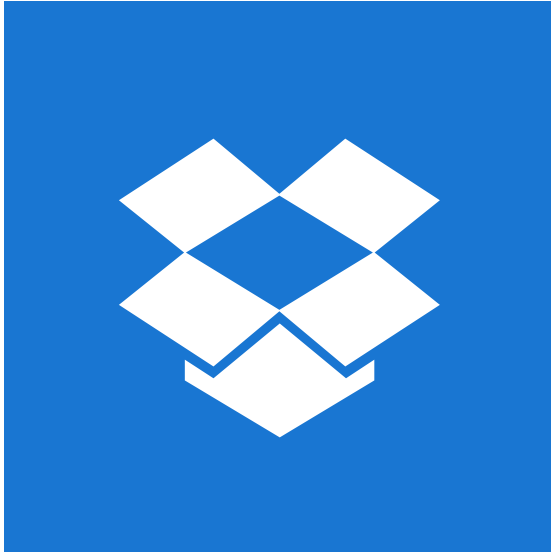
*Start writing here..*

## Help tip

Mention the ice cream truck products your business will offer. This list may include products like,

To unlock help try Upmetrics!

# Products



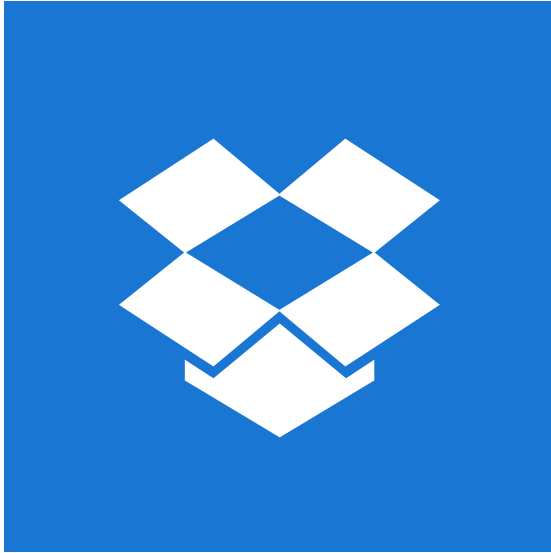
## Classic Ice Cream Cones

Price: **[\$3.00 - \$4.00]**

A range of your favorite ice cream flavors served in a fresh, crispy cone. Perfect for a quick treat on a sunny day.

### Specifications

- Flavors Available: Vanilla, Chocolate, Strawberry, Mint Chocolate Chip, Cookies & Cream
- Cone Types: Regular, Waffle (+\$1.00)
- Serving Size: Single scoop (with the option to add additional scoops for [\$1.00] each)
- Toppings: Sprinkles, Chocolate Chips, Nuts (Additional [\$0.50] each)



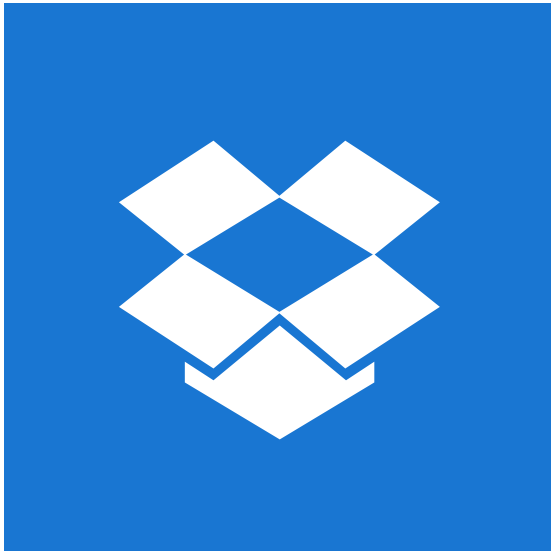
## Ice Cream Bars & Popsicles

Price: **[\$2.00 - \$3.50]**

A selection of pre-packaged ice cream bars and popsicles for an on-the-go, mess-free experience.

### Specifications

- Options: Classic Ice Cream Bars, Fruit Popsicles, Gelato Bars
- Flavors: Various, including seasonal and limited-edition options
- Packaging: Individually wrapped for convenience and hygiene



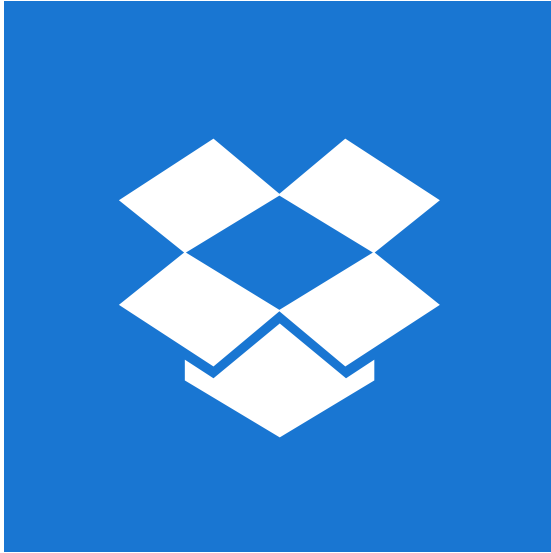
## Soft Serve Ice Cream

Price: **[\$3.00 - \$4.50]**

Creamy, smooth soft serve ice cream available in a variety of flavors and served in a cone or cup.

### Specifications

- Flavors: Vanilla, Chocolate, Swirl
- Serving Options: Cone or Cup
- Sizes: Small, Medium, Large
- Toppings: Hot Fudge, Caramel, Sprinkles, Whipped Cream (Additional [\$0.50] each)



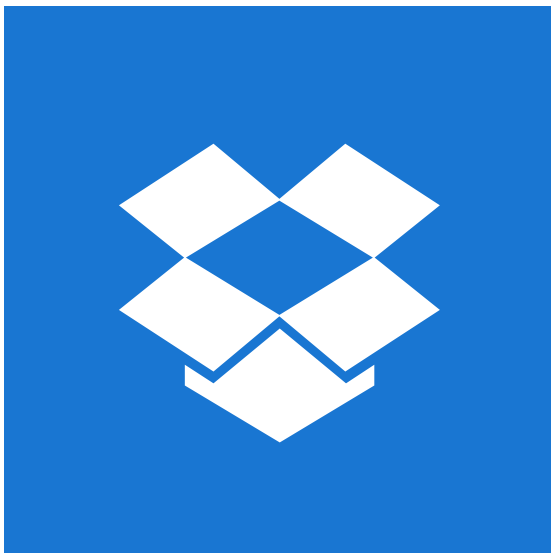
## Gourmet Ice Cream

Price: **[\$4.50 - \$6.00]**

Indulge in our premium range of gourmet ice cream flavors, made with high-quality ingredients and unique combinations.

### Specifications

- Flavors: Lavender Honey, Bourbon Vanilla Bean, Salted Caramel Pretzel, and more
- Serving Size: Single scoop (with the option to add additional scoops for [\$2.00] each)
- Toppings: Gourmet options available including hand-crafted sauces and luxury sprinkles (Additional [\$1.00] each)



## Sundaes


Price: **[\$5.00 - \$7.00]**


Our sundaes are a delightful treat, with layers of ice cream, toppings, and sauces, creating a dessert experience like no other

### Specifications

- Flavors: Customer's choice of any available ice cream flavors
- Sizes: Regular, Large
- Included Toppings: Whipped Cream, Nuts, Cherry on Top
- Extra Toppings: Choice of 3 additional toppings included; extra toppings available for [\$0.50] each


## Product Sourcing

 **Help tip**

 **Ice Cream Truck Business Plan**


In all descriptions of services, emphasize the importance of safety and quality.


Explain how your printing house will ensure that all services are delivered with the highest

To unlock help try Upmetrics! 


*Start writing here..*

## Additional Services

 **Help tip**

 **Ice Cream Truck Business Plan**

Include information about the kinds of events you cater and the services you offer in this section if you provide catering or event services.

To unlock help try Upmetrics! 

*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.

To unlock help try Upmetrics!

#### Help Tip

#### Ice Cream Truck 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.

To unlock help try Upmetrics!

*Start writing here..*

## Unique Selling Proposition (USP)

#### Help tip

#### Ice Cream Truck 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.

To unlock help try Upmetrics!

*Start writing here..*

## Pricing Strategy

#### Help tip

#### Ice Cream Truck Business Plan

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

To unlock help try Upmetrics!

*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, content marketing, and print marketing.

To unlock help try Upmetrics! 🔒

## Marketing strategies

### Online



#### **Social Media**

Utilizing platforms such as Instagram, Facebook, and Twitter to share updates, promotions, and engage with our community.



#### **Email Marketing**

Regular newsletters and updates to our subscriber base.



#### **Content Marketing**

Creating and sharing engaging content, including blogs, videos, and infographics, to educate our audience about our products and values.

### Offline



#### **Brochures**

Detailed informational brochures available at our outlets and events.



#### **Print Marketing**

Distributing flyers and brochures in strategic locations and during community events to increase visibility.



#### **Events**

Participation in [specific events, e.g., "industry trade shows and local tech fairs"].



#### **Local Partnerships**

Collaborating with local businesses and organizations for cross-promotional opportunities.

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

To unlock help try Upmetrics! 

## Sales strategies



### **Strategic Location Planning**

Utilizing data and local insights to position our ice cream truck in high-traffic and high-visibility areas.



### **Event Bookings**

Actively seeking and securing bookings for private and corporate events to generate additional revenue streams.



### **Referral Programs**

Implementing a referral program to encourage satisfied customers to refer new clients, rewarding them with discounts or free products.

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

To unlock help try Upmetrics! 

## Customer retention



### **Loyalty Programs**

Offering a loyalty program that rewards frequent purchases, encouraging customers to choose [Chill on Wheels] time and time again



### **Feedback and Improvement**

Actively seeking customer feedback and using it to continually improve our products and services.



### **Personalized Service**

Taking note of regular customers' preferences to provide a personalized service experience.

# 6.

## Operations Plan

Staffing & Training

Operational Process

Equipment & Machinery



#### REMEMBER

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

To unlock help try Upmetrics!

#### Help tip

#### Ice Cream Truck 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.

To unlock help try Upmetrics!

*Start writing here..*

## Staffing & Training

#### Help tip

#### Ice Cream Truck Business Plan

Mention your business's staffing requirements, including the number of employees, cashiers, or food preparation staff needed. Include their qualifications, the training required, and the duties they will perform.

To unlock help try Upmetrics!

*Start writing here..*

## Operational Process

#### Help tip


#### Ice Cream Truck Business Plan


Outline the processes and procedures you will use to run your ice cream truck business. Your operational processes may include menu planning, driving to locations, preparing food, ordering materials, etc.

To unlock help try Upmetrics!

*Start writing here..*


# Equipment & Machinery

 **Help tip**

 **Ice Cream Truck Business Plan**

Include the list of equipment and machinery required for an ice cream truck business, such as ice cream trucks, refrigerators, utensils, etc.

To unlock help try Upmetrics!



*Start writing here..*

# 7.

## Management Team

Key managers

Organizational structure

Compensation plan

Advisors/Consultants





## REMEMBER

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

To unlock help try Upmetrics!

### Help tip

### Ice Cream Truck 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.

To unlock help try Upmetrics!

*Start writing here..*

## Key managers

### Help tip

### Ice Cream Truck Business Plan

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

To unlock help try Upmetrics!

*Start writing here..*



### John Doe

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

The visionary behind [Chill on Wheels], our Founder and CEO plays a pivotal role in steering the company towards success.



---

## Jane Doe

Inventory Manager - [jane.doe@example.com](mailto:jane.doe@example.com)

Jane brings over a decade of experience in inventory management and supply chain logistics to [Chill on Wheels].



Her expertise in negotiating with suppliers and managing inventory levels ensures that our ice cream truck is always stocked with the freshest and highest-quality products.

- **Educational Background:** Jane holds a Bachelor's degree in Business Administration with a specialization in Supply Chain Management from [University Name].
- **Professional Background:** Before joining [Chill on Wheels], Jane worked as a Senior Inventory Analyst at [Previous Company Name], where she successfully managed inventory for a large retail chain, significantly reducing wastage and improving supply chain efficiency.



---

## Alice Brown

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

Alice is the driving force behind the seamless day-to-day operations of [Chill on Wheels].



Her strong leadership skills and extensive experience in operations management ensure that our staff is motivated, our customers are satisfied, and our business runs efficiently.

- **Educational Background:** Alice has a Master's degree in Operations Management from [University Name].
- **Professional Background:** Alice has over eight years of experience in the food and beverage industry, having previously held the position of Assistant Operations Manager at [Previous Company Name], where she was instrumental in improving operational workflows and customer service standards.



## Robert Brown

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

Robert is our creative genius, responsible for developing innovative marketing strategies that put [Chill on Wheels] on the map.




His knack for identifying market trends and his expertise in digital marketing have been crucial in building our brand's presence and driving sales.

- **Educational Background:** Robert earned his Bachelor's degree in Marketing from [University Name], with a focus on digital marketing and brand management.
- **Professional Background:** With over six years of experience in marketing within the food industry, Robert has a proven track record of successful campaign management and brand development.

He previously worked as a Marketing Specialist at [Previous Company Name], where he led numerous successful promotional campaigns.

## Organizational structure

 **Help tip**

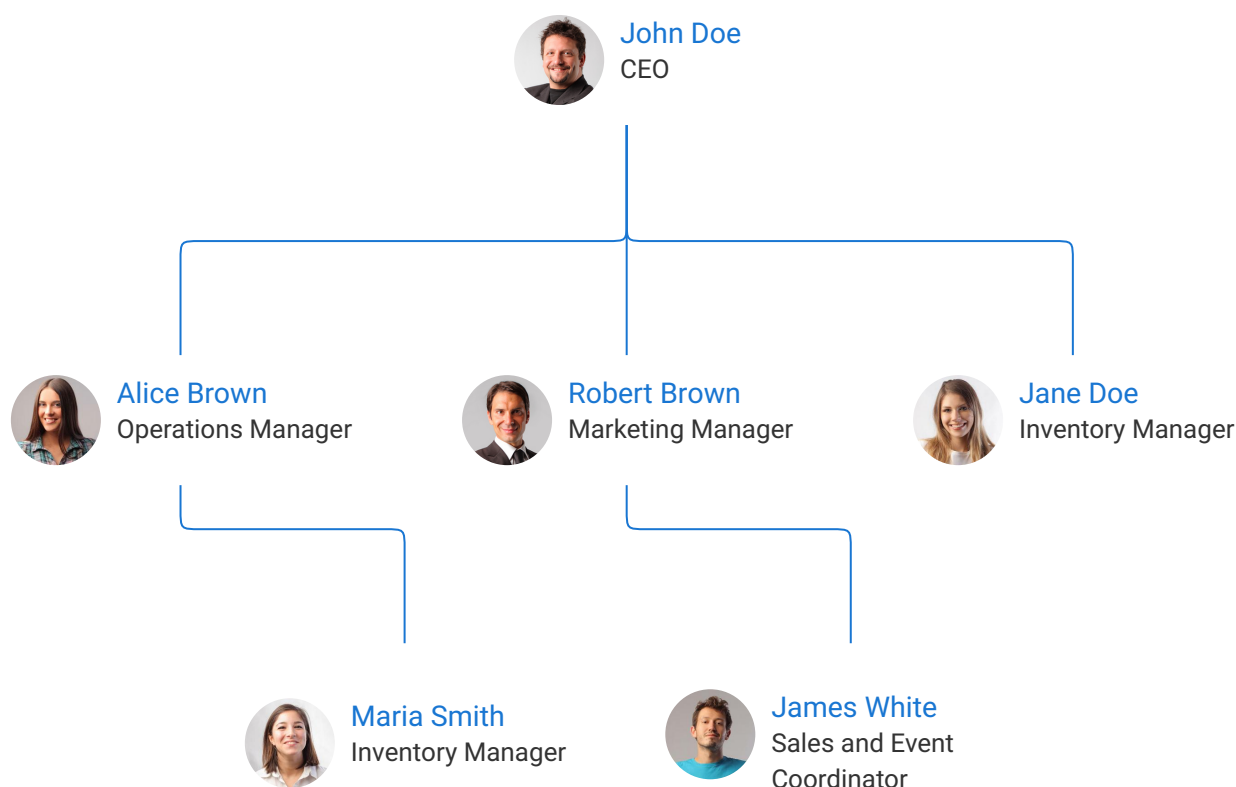
 **Ice Cream Truck Business Plan**

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**

**Ice Cream Truck 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..*

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

To unlock help try Upmetrics! 🔒

## Advisors/Consultants



### [ADVISOR NAME]

Advisor

- [Advisor's Name], providing expertise in [Area of Expertise].
- [Brief description of their experience, credentials, and any relevant industry involvement.]

# 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

### Ice Cream Truck 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.

To unlock help try Upmetrics!

Start writing here..

## Help tip

### Ice Cream Truck Business Plan

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.

To unlock help try Upmetrics!

## Profit & loss statement

	2024	2025	2026
<b>Revenue</b>	<b>\$342,458.21</b>	<b>\$633,995.39</b>	<b>\$1,183,915.07</b>
Specialty Ice Cream	\$90,154.26	\$144,339.84	\$231,092.82

	2024	2025	2026
Unit Sales	15,026	24,057	38,515
Unit Price	\$6	\$6	\$6
Event Catering	\$83,604.50	\$150,199	\$269,769.50
Unit Sales	239	429	771
Unit Price	\$350	\$350	\$350
Traditional Ice Cream	\$168,699.45	\$339,456.55	\$683,052.75
Unit Sales	33,740	67,891	136,611
Unit Price	\$5	\$5	\$5
<b>Cost Of Sales</b>	<b>\$186,000</b>	<b>\$186,000</b>	<b>\$186,000</b>
General Costs	\$186,000	\$186,000	\$186,000
Ice Cream and Cones	\$102,000	\$102,000	\$102,000
Ice Cream Base	\$54,000	\$54,000	\$54,000
Cones	\$48,000	\$48,000	\$48,000
Toppings and Supplies	\$84,000	\$84,000	\$84,000
Toppings	\$36,000	\$36,000	\$36,000
Napkins and Spoons	\$48,000	\$48,000	\$48,000



	2024	2025	2026
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
<b>Gross Margin</b>	<b>\$156,458.21</b>	<b>\$447,995.39</b>	<b>\$997,915.07</b>
<b>Gross Margin (%)</b>	<b>45.69%</b>	<b>70.66%</b>	<b>84.29%</b>
<b>Operating Expense</b>	<b>\$234,600</b>	<b>\$241,365</b>	<b>\$248,334.36</b>
Payroll Expense (Indirect Labor)	\$223,500	\$230,205	\$237,111.36
Operations Staff	\$66,000	\$67,980	\$70,019.52
Truck Operator	\$39,000	\$40,170	\$41,375.16
Assistant Operator	\$27,000	\$27,810	\$28,644.36
Sales and Marketing	\$76,200	\$78,486	\$80,840.64
Marketing Coordinator	\$43,200	\$44,496	\$45,830.88
Sales Representative	\$33,000	\$33,990	\$35,009.76
Administration	\$81,300	\$83,739	\$86,251.20

	2024	2025	2026
Administrative Assistant	\$28,800	\$29,664	\$30,553.92
Accountant	\$52,500	\$54,075	\$55,697.28
General Expense	\$11,100	\$11,160	\$11,223
Vehicle Expenses	\$5,400	\$5,460	\$5,523
Fuel	\$2,400	\$2,400	\$2,400
Maintenance	\$1,800	\$1,800	\$1,800
Insurance	\$1,200	\$1,260	\$1,323
Operating Expenses	\$900	\$900	\$900
Utilities	\$600	\$600	\$600
Permits and Licenses	\$300	\$300	\$300
Marketing and Advertising	\$4,800	\$4,800	\$4,800
Online Advertising	\$3,600	\$3,600	\$3,600
Flyers and Posters	\$1,200	\$1,200	\$1,200
Bad Debt	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0

	2024	2025	2026
<b>EBITDA</b>	<b>(\$78,141.79)</b>	<b>\$206,630.39</b>	<b>\$749,580.71</b>
<b>Additional Expense</b>	<b>\$6,521.72</b>	<b>\$6,194.57</b>	<b>\$5,847.25</b>
Long Term Depreciation	\$4,866	\$4,866	\$4,866
Gain or loss from Sale of Assets	\$0	\$0	\$0
<b>EBIT</b>	<b>(\$83,007.79)</b>	<b>\$201,764.39</b>	<b>\$744,714.71</b>
Interest Expense	\$1,655.71	\$1,328.57	\$981.25
<b>EBT</b>	<b>(\$84,663.51)</b>	<b>\$200,435.82</b>	<b>\$743,733.46</b>
Income Tax Expense / Benefit	\$0	\$0	\$0
<b>Total Expense</b>	<b>\$427,121.72</b>	<b>\$433,559.57</b>	<b>\$440,181.61</b>
<b>Net Income</b>	<b>(\$84,663.51)</b>	<b>\$200,435.82</b>	<b>\$743,733.46</b>
<b>Net Income (%)</b>	<b>(24.72%)</b>	<b>31.61%</b>	<b>62.82%</b>
Retained Earning Opening	\$0	(\$87,663.51)	\$111,772.31

	2024	2025	2026
Owner's Distribution	\$3,000	\$1,000	\$1,000
<b>Retained Earning Closing</b>	<b>(\$87,663.51)</b>	<b>\$111,772.31</b>	<b>\$854,505.77</b>

💡 Help tip

📁 Ice Cream Truck Business Plan

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.

To unlock help try Upmetrics! 🔒

## Cash flow statement

	2024	2025	2026
<b>Cash Received</b>	<b>\$342,458.21</b>	<b>\$633,995.39</b>	<b>\$1,183,915.07</b>
<b>Cash Paid</b>	<b>\$422,255.72</b>	<b>\$428,693.57</b>	<b>\$435,315.61</b>
COS & General Expenses	\$197,100	\$197,160	\$197,223
Salary & Wages	\$223,500	\$230,205	\$237,111.36
Interest	\$1,655.71	\$1,328.57	\$981.25
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0

	2024	2025	2026
<b>Net Cash From Operations</b>	<b>(\$79,797.51)</b>	<b>\$205,301.82</b>	<b>\$748,599.46</b>
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$30,000	\$0	\$0
<b>Net Cash From Investments</b>	<b>(\$30,000)</b>	<b>\$0</b>	<b>\$0</b>
<b>Amount Received</b>	<b>\$50,000</b>	<b>\$0</b>	<b>\$0</b>
Loan Received	\$30,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$20,000	\$0	\$0
<b>Amount Paid</b>	<b>\$8,304.04</b>	<b>\$6,631.19</b>	<b>\$6,978.51</b>
Loan Capital	\$5,304.05	\$5,631.19	\$5,978.51
Dividends & Distributions	\$3,000	\$1,000	\$1,000
<b>Net Cash From Financing</b>	<b>\$41,695.96</b>	<b>(\$6,631.19)</b>	<b>(\$6,978.51)</b>



2024

2025

2026

**Summary**

Starting Cash	\$0	(\$68,101.55)	\$130,569.08
Cash In	\$392,458.21	\$633,995.39	\$1,183,915.07
Cash Out	\$460,559.76	\$435,324.76	\$442,294.12
Change in Cash	(\$68,101.55)	\$198,670.63	\$741,620.95
<b>Ending Cash</b>	<b>(\$68,101.55)</b>	<b>\$130,569.08</b>	<b>\$872,190.03</b>

 Help tip Ice Cream Truck Business Plan

Create a projected balance sheet documenting your ice cream truck business's assets, liabilities, and equity.

To unlock help try Upmetrics! 

## Balance sheet

2024

2025

2026

<b>Assets</b>	(\$42,967.55)	\$150,837.08	\$887,592.03
<b>Current Assets</b>	(\$68,101.55)	\$130,569.08	\$872,190.03

	2024	2025	2026
Cash	(\$68,101.55)	\$130,569.08	\$872,190.03
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
<b>Long Term Assets</b>	<b>\$25,134</b>	<b>\$20,268</b>	<b>\$15,402</b>
Gross Long Term Assets	\$30,000	\$30,000	\$30,000
Accumulated Depreciation	(\$4,866)	(\$9,732)	(\$14,598)
<b>Liabilities &amp; Equity</b>	<b>(\$42,967.55)</b>	<b>\$150,837.08</b>	<b>\$887,592.03</b>
<b>Liabilities</b>	<b>\$24,695.96</b>	<b>\$19,064.77</b>	<b>\$13,086.26</b>
<b>Current Liabilities</b>	<b>\$5,631.19</b>	<b>\$5,978.51</b>	<b>\$0</b>
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$5,631.19	\$5,978.51	\$0
<b>Long Term Liabilities</b>	<b>\$19,064.77</b>	<b>\$13,086.26</b>	<b>\$13,086.26</b>
Long Term Debt	\$19,064.77	\$13,086.26	\$13,086.26

	2024	2025	2026
<b>Equity</b>	<b>(\$67,663.51)</b>	<b>\$131,772.31</b>	<b>\$874,505.77</b>
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$20,000	\$20,000	\$20,000
Retained Earnings	(\$87,663.51)	\$111,772.31	\$854,505.77
<b>Check</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

#### Help tip

#### Ice Cream Truck 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.

To unlock help try Upmetrics! 

## Break-even Analysis

	2024	2025	2026
Starting Revenue	\$0	\$342,458.21	\$976,453.60




	2024	2025	2026
Net Revenue	\$342,458.21	\$633,995.39	\$1,183,915.07
<b>Closing Revenue</b>	<b>\$342,458.21</b>	<b>\$976,453.60</b>	<b>\$2,160,368.67</b>
Starting Expense	\$0	\$427,121.72	\$860,681.29
Net Expense	\$427,121.72	\$433,559.57	\$440,181.61
<b>Closing Expense</b>	<b>\$427,121.72</b>	<b>\$860,681.29</b>	<b>\$1,300,862.90</b>
Is Break Even?	No	Yes	Yes
<b>Break Even Month</b>	<b>0</b>	<b>Aug '25</b>	<b>0</b>
<b>Days Required</b>	<b>0</b>	<b>23 Days</b>	<b>0</b>
<b>Break Even Revenue</b>	<b>\$427,121.72</b>	<b>\$707,120.70</b>	<b>\$0</b>
Specialty Ice Cream	\$0	\$175,717.76	\$0
Event Catering	\$0	\$170,606.57	\$0
Traditional Ice Cream	\$0	\$360,796.37	\$0
<b>Break Even Units</b>			
Specialty Ice Cream	0	29,286	0

	2024	2025	2026
Event Catering	0	487	0
Traditional Ice Cream	0	72,159	0

## Financing needs

 **Help tip**

 **Ice Cream Truck Business Plan**

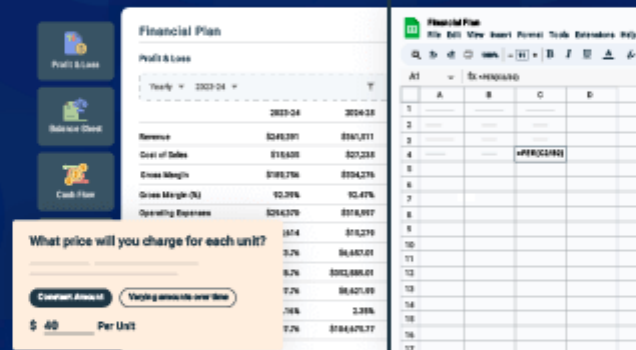
Calculate costs associated with starting an ice cream truck business, and estimate your financing needs and how much capital you need to raise to operate your business.

To unlock help try Upmetrics! 

*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 the Upmetrics Financial Plan interface. On the left, there are three buttons: 'Profit & Loss', 'Balance Sheet', and 'Cash Flow'. The 'Profit & Loss' button is selected. Below these buttons is a form titled 'What price will you charge for each unit?' with a 'Calculate' button. The main part of the interface is a table showing financial data for two periods: 2023-04 and 2024-04. The table has columns for Revenue, Cost of Sales, Gross Margin, and Operating Expenses. The data is as follows:

	2023-04	2024-04
Revenue	\$245,391	\$181,111
Cost of Sales	\$18,608	\$27,238
Gross Margin	\$196,783	\$154,273
Gross Margin (%)	80.2%	85.2%
Operating Expenses	\$24,329	\$18,957
	\$14	\$15,279
	0.2%	\$6,657.01
	0.2%	\$102,695.01
	7.2%	\$6,621.00
	.16%	3.35%
	7.2%	\$184,675.77



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 more.

To unlock help try Upmetrics!

# Create a winning business plan that gets you funded

Creating a stunning and investment-ready plan requires no writing, graphic designing, or financial planning expertise.

Upmetrics has all the features required to help you create a comprehensive business plan—from start to finish. Make no mistakes, it's the modern way of planning to structure ideas, make plans, and create stunning pitch decks to awe investors.

## Pitch decks that impress investors

Create pitch decks that provide a visual representation of your business, engage investors, and make them want to invest in your business idea.

## Stunning cover page designs

With Upmetrics, you have the liberty to choose from multiple stunning cover page designs. Choose a creative design and make your plan stand out.

## Online sharing made simple

Upmetrics makes online sharing quick and easier for users. Easily share your business plans with a link while tracking reader activity.

## Interactive plans in no time

Import business plan sections like—SWOT analysis, comparison tables, and others to create an interactive business plan. No designing skills are required.

## 500+ sample business plans

Simply import a template from our library of sample plans into the editor and start customizing it to make it yours. It takes only a few clicks to get started.

## Collaborate with team in real-time

Invite team members, initiate conversations, discuss ideas & strategies, share feedback, and work on a business plan in real-time.



**Mariia Yevlash**



Student, Sumy State University – Ukraine

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

Create winning Business Plans with our

## AI Business Plan Platform

**Get Started Today!**

15-day money-back guarantee

