


BUSINESS PLAN [YEAR]





Marketing Consultant Business Plan

Consulting, Growth, Marketing

 **John Doe**

 10200 Bolsa Ave, Westminster, CA, 92683

 (650) 359-3153

 info@example.com

 <http://www.example.com>

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.

Table of Contents

Executive Summary	6
Market opportunity	7
Services Offered	7
Marketing & Sales Strategies	8
Financial Highlights	8
Units Sold v/s Revenue	9
Company Overview	10
Ownership	11
Business Owners	11
Mission statement	12
Business history	12
Future goals	12
Market Analysis	13
Target Market	14
Market size and growth potential	14
Market Size	15
Competitive analysis	15
BrandMasters Consulting	15
Digital Dynamos Inc.	16
CommsCrafters	16
Market trends	16
Regulatory environment	17
Products and Services	18
Services	19
SEO Services	19
Content Marketing Services	20
Ad Campaign Services	20
Branding Development	21

PR Activities	21
Consultation and Advisory Services	22
Quality Measures	22
Additional Services	22

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	27

Operations Plan 28

Staffing & Training	29
Operational Process	29
Tools & Equipment	30

Management Team 31

Key managers	32
John Doe	32
Jane Smith	33
Alice Brown	33
Robert Brown	33
Organizational structure	34
Organization chart	34
Compensation plan	34
Board of advisors	35
[ADVISOR NAME]	35

Financial Plan 36

Profit & loss statement	37
-------------------------------	----

Cash flow statement	42
Balance sheet	44
Break-even Analysis	46
Financing needs	48

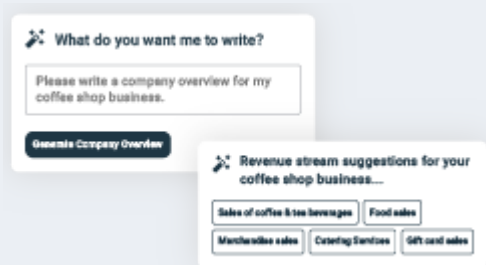
Appendix

50

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 & 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

Marketing Consultant Business Plan

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

This section may include the name of your marketing consultancy, its location, when it was

To unlock help try Upmetrics!

Start writing here..

Market opportunity

Help tip

Marketing Consultant 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

Marketing Consultant Business Plan


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

To unlock help try Upmetrics!

Start writing here..

Marketing & Sales Strategies

 **Help tip**

 **Marketing Consultant 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**

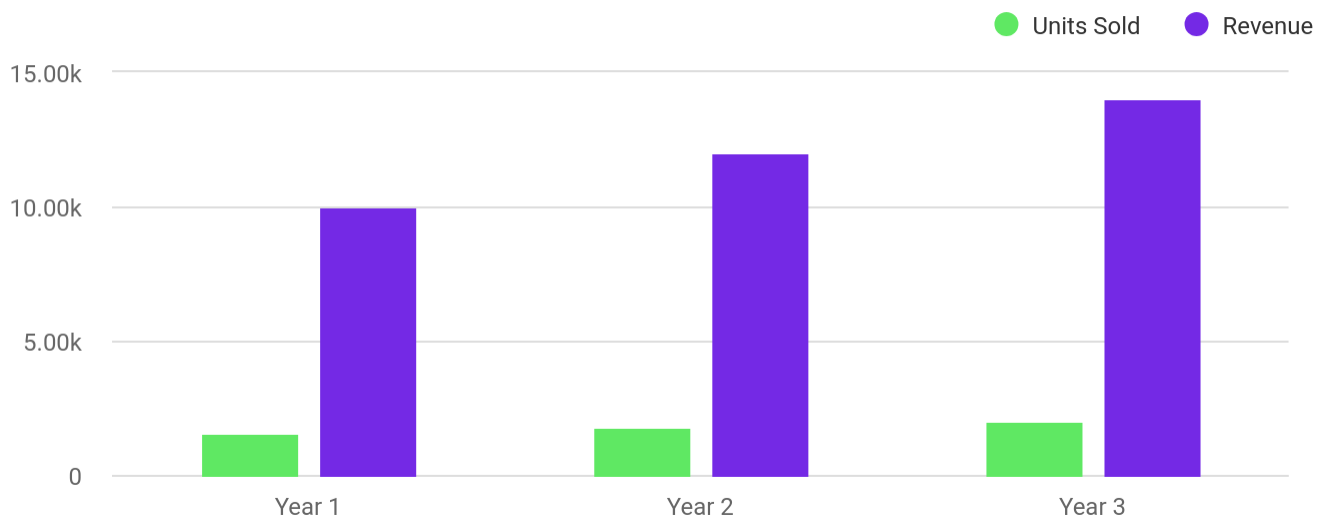
 **Marketing Consultant Business Plan**

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

 Marketing Consultant 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

Marketing Consultant Business Plan

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

Describe what kind of marketing consultancy you run and the name of it. You may specialize in

To unlock help try Upmetrics!

Start writing here..

Ownership

Help tip

Marketing Consultant Business Plan

List the names of founders or owners of your marketing consultancy. Describe what shares they own and their responsibilities for efficiently managing the business.

To unlock help try Upmetrics!


Start writing here..

Business Owners



Mission statement

 Help tip

 Marketing Consultant 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 [Strategic Solutions], our mission is to empower businesses with [Specific Principle, e.g., innovative and bespoke marketing strategies], anchored in integrity, excellence, and a dedication to forging genuine connections.

Our approach is not just about reaching audiences—it's about resonating with them.



Business history

 Help tip

 Marketing Consultant Business Plan


If you're an established consultancy offering marketing services, 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

 Marketing Consultant 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

Marketing Consultant 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

Marketing Consultant 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

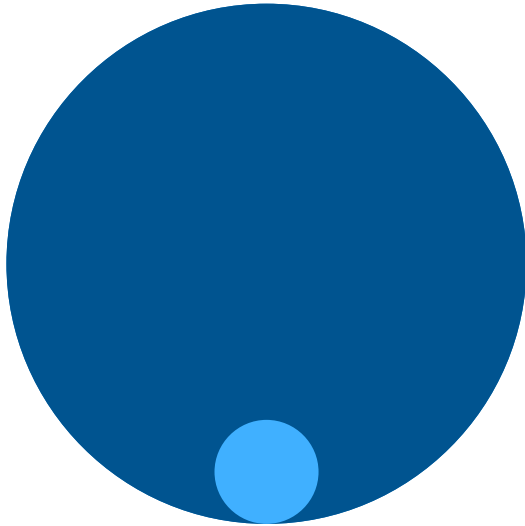
Marketing Consultant Business Plan

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

All businesses operating online and require marketing services in the U.S.

1M

Served Market

U.S. businesses actively seeking and investing in specialized marketing consultancy.

1M

Target Market

U.S. ECommerce, online brands, and startups needing comprehensive digital strategies.

200k

Help tip

Marketing Consultant Business Plan

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

To unlock help try Upmetrics!

Competitive analysis

BrandMasters Consulting

Established in 2010, BrandMasters Consulting has quickly risen to be a recognizable name in the marketing consultancy sphere. With a primary focus on branding strategies, they cater predominantly to mid-size businesses looking to revamp or strengthen their brand image.

Features

- Comprehensive brand audits
- Logo and brand design solutions
- Integrated branding campaigns
- Cross-channel brand storytelling

Strengths

- Adept at creating cohesive brand narratives
- Strong track record with established businesses
- Renowned for their in-depth audits

Weaknesses

- Limited focus on emergent digital marketing strategies
- Higher pricing model may deter startups and small businesses
- Slower adaptability to fast-changing market trends

Digital Dynamos Inc.

Digital Dynamos Inc., founded in 2015, emphasizes harnessing the power of digital channels. They have a knack for deciphering the complex digital landscape and tailoring strategies for businesses to thrive online.

Features

- SEO and SEM services
- Social media marketing campaigns
- Email marketing strategies
- Content optimization

Strengths

- Rapid adaptation to digital trends
- Holistic online marketing services
- Effective data-driven strategies

Weaknesses

- Limited offline or print marketing solutions
- Occasionally spread too thin, leading to diluted campaign efficacy
- Has faced criticism for not offering personalized solutions

CommsCrafters

CommsCrafters, operating since 2008, prioritizes communication. Their forte lies in PR and communication strategies, aiding businesses in crafting their public image and handling media relations.

Features

- PR campaigns
- Crisis communication plans
- Media training and workshops
- Stakeholder communication strategies

Strengths


- Extensive network in the media industry
- Expertise in crisis management
- Tailored communication workshops

Weaknesses


- Less emphasis on broader marketing strategies
- Can be reactive rather than proactive
- Pricing model not transparent, leading to client reservations

Market trends

 **Help tip**

 **Marketing Consultant Business Plan**

Analyze emerging trends in the marketing industry, such as AI for predictive analysis, AR and VR for immersive brand experience, voice optimization, etc. Explain how your business will cope with all the trends.

To unlock help try Upmetrics! 

Start writing here..

Regulatory environment

Help tip

Marketing Consultant Business Plan

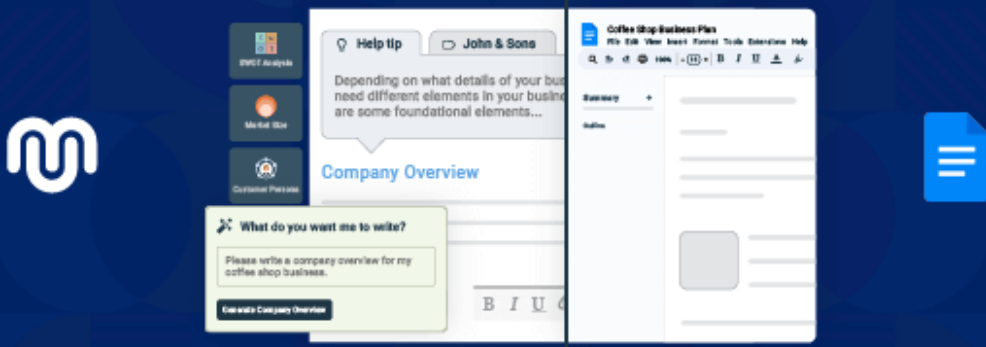
List regulations and licensing requirements that may affect your marketing consultant company, such as business registration, intellectual property rights, data protection compliances, insurance, environmental regulations, state and federal

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.



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

Quality Measures

Additional Services



REMEMBER

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

To unlock help try Upmetrics!

Help tip

Marketing Consultant 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!

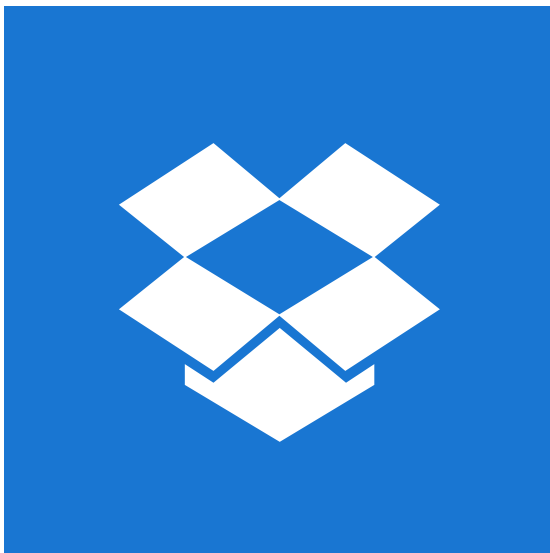
Start writing here..

Help tip

Mention the marketing consultancy services your business will offer. This list may include services like,

To unlock help try Upmetrics!

Services



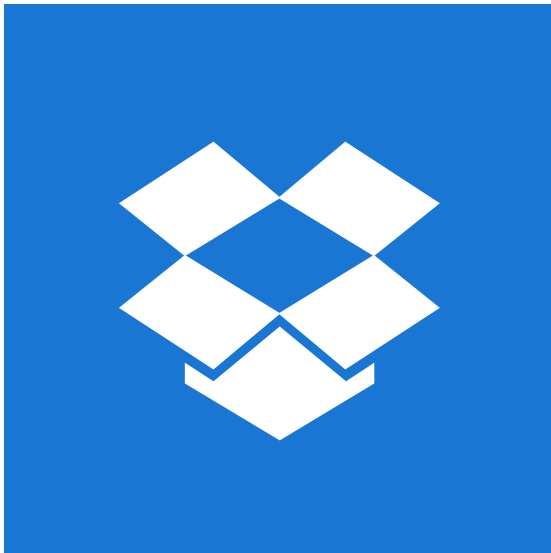
SEO Services

Price: **[\$2,500] per month**

Our SEO services aim to improve the online visibility of our clients' websites, ensuring higher organic rankings on search engines, increased web traffic, and better conversion rates.

Specifications

- Keyword research and optimization
- On-page SEO enhancements
- Backlink strategy and link-building
- Technical SEO audits and improvements
- Monthly reporting on keyword rankings and website analytics



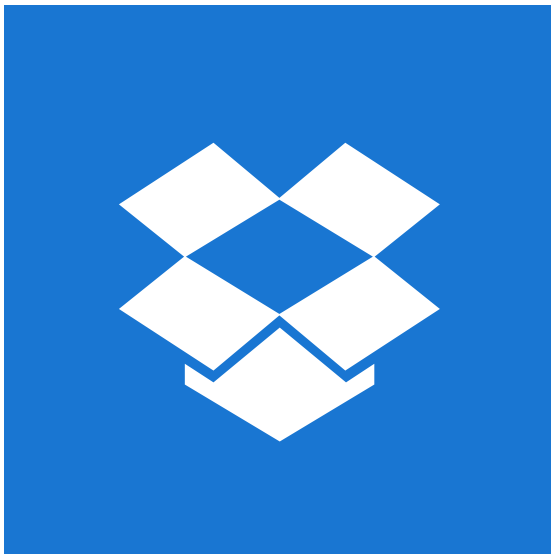
Content Marketing Services

Price: **[\$1,500] per month (Package includes 8 professionally written articles)**

We curate compelling narratives that not only resonate with your target audience but also reinforce your brand message. Through strategic content marketing, we aim to engage, educate, and inspire action.

Specifications

- Comprehensive content strategy development
- Blog posts, articles, and web content creation
- Infographics and multimedia content production
- Content distribution and promotion on relevant platforms
- Periodic content performance analytics



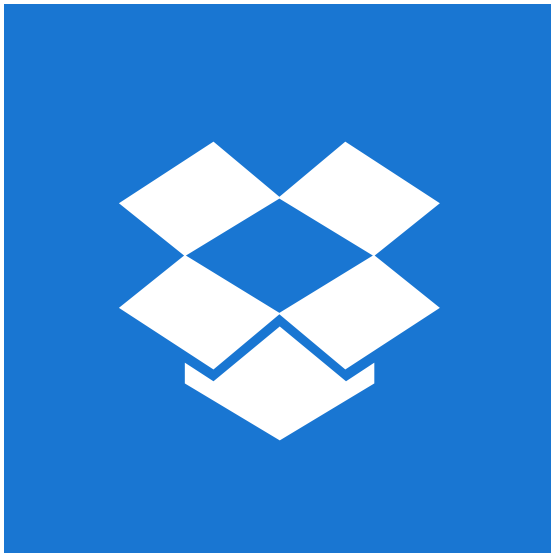
Ad Campaign Services

Price: **[\$3,500] per month (Excludes ad spend)**

[Strategic Solutions] provides a holistic approach to paid advertising, ensuring our clients get maximum ROI. From strategy to implementation and optimization, we ensure your brand message reaches the right audience at the right time.

Specifications

- Ad strategy development based on target audience insights
- Creation of ad creatives - visuals and copy
- Campaign set up across platforms like Google Ads, Facebook Ads, etc.
- Ongoing monitoring, optimization, and A/B testing of ad campaigns
- Detailed monthly reporting on ad performance and spend



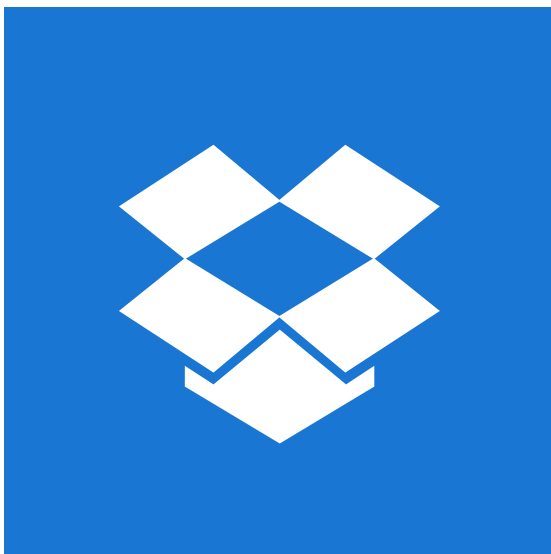
Branding Development

Price: **[\$5,000]** (One-time fee for a comprehensive branding package)

Your brand is more than just a logo—it's an experience. Our branding development services are crafted to resonate with your ethos, ensuring a coherent and impactful brand image across all touchpoints.

Specifications

- Brand strategy sessions
- Logo design and brand collateral creation
- Brand guideline documentation (colors, fonts, usage, etc.)
- Messaging and brand voice development
- Recommendations for brand touchpoints (website, social media, print, etc.)



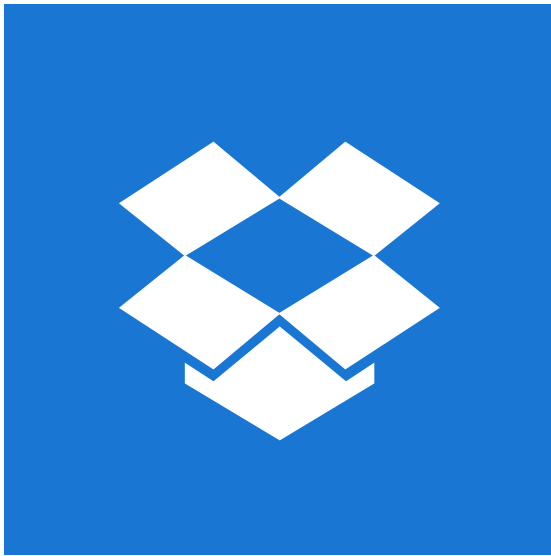
PR Activities

Price: **[\$3,000]** per month

Crafting a positive brand image through strategic public relations efforts, we ensure your business garners the right kind of attention in the media and industry events.

Specifications

- Media outreach and press release distribution
- Crisis management and communication strategy
- Event PR and media liaison
- Brand reputation monitoring and feedback
- Monthly PR activity reports and media mentions



Consultation and Advisory Services

Price: **[\$150] per hour**


Whether you're a startup or an established brand, our consultation services provide actionable insights and strategies to navigate the marketing landscape effectively.

Specifications

- One-on-one consultation sessions
- Comprehensive business and marketing strategy reviews
- Recommendations based on industry best practices and trends
- Actionable takeaways for immediate implementation
- Follow-up sessions for strategy adjustments and improvements

Quality Measures

 **Help tip**

 **Marketing Consultant Business Plan**


This section should explain how you maintain quality standards and consistently provide the highest quality service.

To unlock help try Upmetrics! 


Start writing here..

Additional Services

 **Help tip**

 **Marketing Consultant Business Plan**

Mention if your marketing consultant company offers any additional services. You may include services like event marketing, influencer marketing, product and video shoots, etc.

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

Marketing Consultant 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

Marketing Consultant 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

Marketing Consultant Business Plan

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

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, Google ads, brochures, email marketing, content marketing, and print marketing.

To unlock help try Upmetrics! 

Marketing strategies

Online



Social Media

Leveraging platforms like [Facebook, Instagram, LinkedIn] to create engaging content and ad campaigns.



Email Marketing

Periodic newsletters and updates to subscribers, offering insights, case studies, and updates



Content Marketing

A regularly updated blog and guest post contributions to industry-leading websites, positioning [Strategic Solutions] as thought leaders in the field.



Google Ads

Reaching out to potential clients actively searching for marketing consultancy services.

Offline



Brochures

Elegant and informative brochures distributed at industry events and to potential clients.



Print Marketing

Strategic placements in industry journals, magazines, and newspapers.

Outline the strategies you'll implement to maximize your sales. Your sales strategies may include consultative selling, direct sales calls, partnering with web agencies and PR firms, offering referral programs, etc.

To unlock help try Upmetrics! 

Sales strategies



Partner with Businesses

Collaborating with web agencies, PR firms, and other industry players to provide complementary services.



Direct Sales Calls

Proactive outreach to potential leads identified through various channels



Referral Programs


Encouraging satisfied clients to refer us through incentivized referral programs.



Consultative Selling

Taking a solution-centric approach to address potential clients' unique challenges.

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

To unlock help try Upmetrics! 

Customer retention



Loyalty Programs

Offering rewards and discounts to repeat clients.



Annual Membership Discounts

Special rates for clients opting for long-term partnerships.



Personalized Service

Assigning dedicated account managers to understand and cater to individual client needs.ed
account managers for personalized assistance.

6.

Operations Plan

Staffing & Training

Operational Process

Tools & Equipment



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

Marketing Consultant 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

Marketing Consultant Business Plan

Mention your marketing business's staffing requirements, including the number of employees, i.e. creative specialists, BD, sales team, and support 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

Marketing Consultant Business Plan


Outline the processes and procedures you will use to run your marketing consultant business. Your operational processes may include making proposals, attending inquiries, implementing projects, taking follow-up, sending invoices, and training and education.

To unlock help try Upmetrics!

Start writing here..

Tools & Equipment

 **Help tip**

 **Marketing Consultant Business Plan**

Include the list of tools and equipment required for marketing consultants, such as software applications, market analysis and research tools, presentation equipment, computers, laptops, security systems, etc.

To unlock help try Upmetrics! 

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

Marketing Consultant 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

Marketing Consultant 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 & Co-founder - john.doe@example.com

- Educational Background: John holds an MBA degree from Harvard Business School with a focus on Strategic Marketing.
- Professional Background: With over 15 years of experience in the marketing consultancy domain, John previously served as the Vice President of Marketing at TechSolutions Inc.

His leadership acumen and innovative strategies have been pivotal in turning around companies and driving exponential growth.



Jane Smith

Chief Operating Officer (COO) - jane.smith@example.com

- Educational Background: Jane earned her Bachelor's degree in Operations Management from MIT Sloan School of Management.
- Professional Background: Jane comes with a rich 12-year experience, having managed operations at leading consultancy firms such as MarketMinds Ltd.

Her proficiency in ensuring streamlined processes and her knack for optimizing resources has consistently led to operational excellence in her previous roles.



Alice Brown

CMO - alice.brown@example.com

- Educational Background: Alice is a graduate of Stanford Graduate School of Business, specializing in Digital Marketing Strategies.
- Professional Background: Formerly the Director of Marketing at InnovateBiz Corp, Alice has over 10 years of experience in branding, market outreach, and positioning strategies.

Her foresight and adaptability have been instrumental in capturing emerging market trends and positioning businesses for success.




Robert Brown


Account Manager - robert.brown@example.com

- Educational Background: Robert possesses a Bachelor's degree in Business Administration from the Wharton School, University of Pennsylvania.
- Professional Background: With 8 years in client relationship roles, Robert previously held the position of Senior Client Coordinator at ConsultHub.

His meticulous attention to detail and client-centric approach have consistently led to high client retention and satisfaction rates.

Organizational structure

 **Help tip**

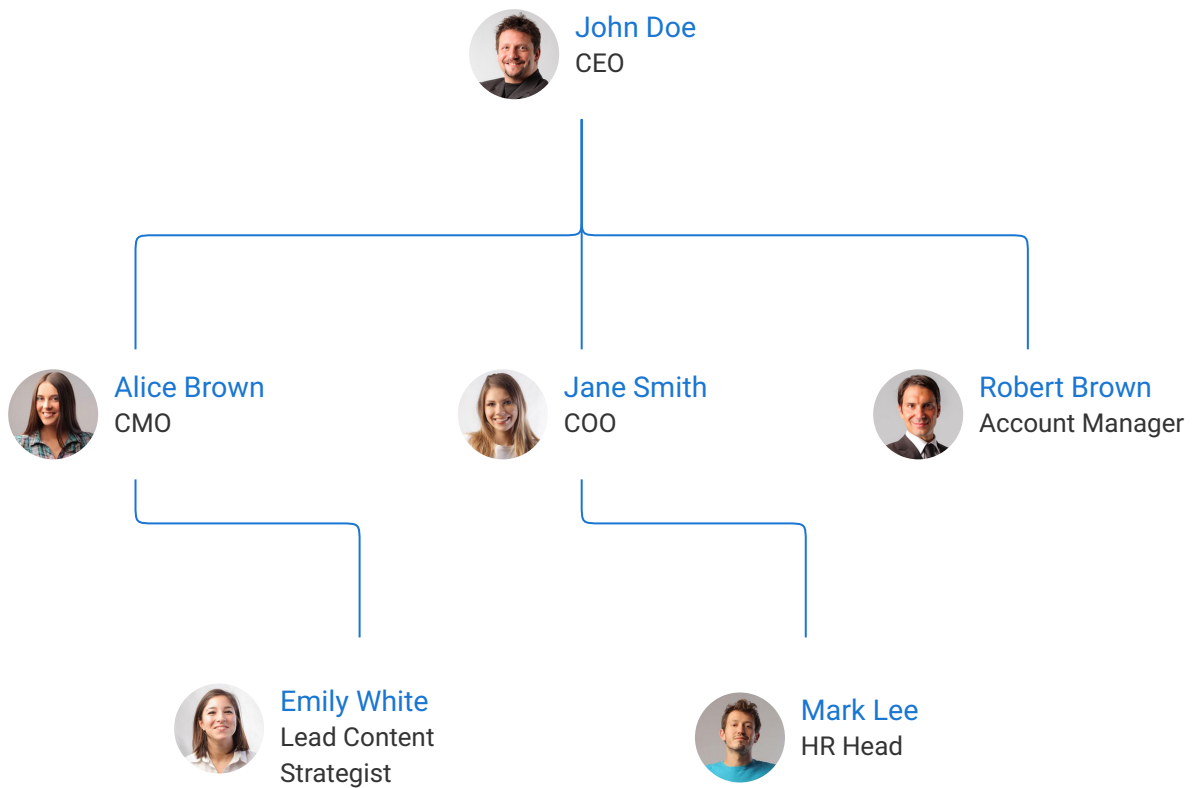
 **Marketing Consultant Business Plan**

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**

 **Marketing Consultant 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! 🔒

Board of advisors



[ADVISOR NAME]

Advisor

A luminary in [specific field], [Name] provides invaluable insights into [specific areas e.g., market trends, business strategy]. With a track record at [notable companies/achievements], their association lends added credibility to our endeavors.

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

Marketing Consultant 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

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
Revenue	\$1,132,855	\$3,087,880	\$7,889,325
Consulting Fees	\$350,165	\$872,800	\$1,283,515

	2024	2025	2026
Users	102	178	241
Recurring Charges	\$500	\$500	\$500
Project-Based Work	\$640,950	\$2,013,000	\$6,317,850
Unit Sales	43	134	421
Unit Price	\$15,000	\$15,000	\$15,000
Workshops and Training	\$141,740	\$202,080	\$287,960
Unit Sales	71	101	144
Unit Price	\$2,000	\$2,000	\$2,000
Cost Of Sales	\$138,646.81	\$166,276.06	\$205,237.71
General Costs	\$138,646.81	\$166,276.06	\$205,237.71
Direct Labor	\$113,863.11	\$130,808.12	\$150,940.09
Freelance Content Creator	\$49,211.23	\$52,223.34	\$55,419.79
Graphic Design Services	\$64,651.88	\$78,584.78	\$95,520.30
Software Subscriptions	\$24,783.70	\$35,467.94	\$54,297.62
Marketing Automation Tools	\$12,050	\$12,600	\$13,230

	2024	2025	2026
Analytics and Reporting Tools	\$12,733.70	\$22,867.94	\$41,067.62
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$994,208.19	\$2,921,603.94	\$7,684,087.29
Gross Margin (%)	87.76%	94.62%	97.40%
Operating Expense	\$808,385.31	\$933,267.82	\$1,170,067.40
Payroll Expense (Indirect Labor)	\$712,860	\$769,878	\$831,909.96
Management	\$202,500	\$222,750	\$245,025
Marketing Director	\$112,500	\$123,750	\$136,125
Project Manager	\$90,000	\$99,000	\$108,900
Creative Team	\$293,760	\$319,680	\$347,915.52
Graphic Designer	\$120,960	\$133,056	\$146,361.60
Content Writer	\$172,800	\$186,624	\$201,553.92


	2024	2025	2026
Sales and Marketing	\$216,600	\$227,448	\$238,969.44
Sales Manager	\$87,000	\$93,960	\$101,476.80
Marketing Analyst	\$129,600	\$133,488	\$137,492.64
General Expense	\$95,525.31	\$163,389.82	\$338,157.44
Office Operations	\$37,512.94	\$42,628.57	\$50,470.32
Office Rent	\$30,000	\$30,600	\$31,212
Utilities	\$7,512.94	\$12,028.57	\$19,258.32
Marketing and Advertising	\$28,904.88	\$54,590.46	\$106,203.19
Digital Advertising	\$25,304.88	\$50,918.46	\$102,457.75
Print Materials	\$3,600	\$3,672	\$3,745.44
Professional Services	\$29,107.49	\$66,170.79	\$181,483.93
Legal Services	\$12,000	\$12,480	\$12,979.20
Accounting Services	\$17,107.49	\$53,690.79	\$168,504.73
Bad Debt	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0

	2024	2025	2026
EBITDA	\$185,822.88	\$1,988,336.12	\$6,514,019.89
Additional Expense	\$19,679.53	\$19,134.30	\$18,555.41
Long Term Depreciation	\$16,920	\$16,920	\$16,920
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	\$168,902.88	\$1,971,416.12	\$6,497,099.89
Interest Expense	\$2,759.52	\$2,214.28	\$1,635.41
EBT	\$166,143.35	\$1,969,201.82	\$6,495,464.48
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$966,711.65	\$1,118,678.18	\$1,393,860.52
Net Income	\$166,143.35	\$1,969,201.82	\$6,495,464.48
Net Income (%)	14.67%	63.77%	82.33%
Retained Earning Opening	\$0	\$141,143.35	\$2,080,345.17

	2024	2025	2026
Owner's Distribution	\$25,000	\$30,000	\$30,000
Retained Earning Closing	\$141,143.35	\$2,080,345.17	\$8,545,809.65

 **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.

To unlock help try Upmetrics! 

Cash flow statement

	2024	2025	2026
Cash Received	\$1,132,855	\$3,087,880	\$7,889,325
Cash Paid	\$949,791.65	\$1,101,758.18	\$1,376,940.52
COS & General Expenses	\$234,172.12	\$329,665.88	\$543,395.15
Salary & Wages	\$712,860	\$769,878	\$831,909.96
Interest	\$2,759.52	\$2,214.28	\$1,635.41
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0

	2024	2025	2026
Net Cash From Operations	\$183,063.35	\$1,986,121.82	\$6,512,384.48
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$70,000	\$0	\$0
Net Cash From Investments	(\$70,000)	\$0	\$0
Amount Received	\$150,000	\$0	\$0
Loan Received	\$50,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$100,000	\$0	\$0
Amount Paid	\$33,840.15	\$39,385.38	\$39,964.27
Loan Capital	\$8,840.16	\$9,385.40	\$9,964.27
Dividends & Distributions	\$25,000	\$30,000	\$30,000
Net Cash From Financing	\$116,159.85	(\$39,385.38)	(\$39,964.27)

2024

2025

2026

Summary

Starting Cash	\$0	\$229,223.20	\$2,175,959.64
Cash In	\$1,282,855	\$3,087,880	\$7,889,325
Cash Out	\$1,053,631.80	\$1,141,143.56	\$1,416,904.79
Change in Cash	\$229,223.20	\$1,946,736.44	\$6,472,420.21
Ending Cash	\$229,223.20	\$2,175,959.64	\$8,648,379.85

Help tip

Create a projected balance sheet documenting your marketing consultancy assets, liabilities, and equity.

To unlock help try Upmetrics! 

Balance sheet

2024

2025


2026

Assets	\$282,303.20	\$2,212,119.64	\$8,667,619.85
Current Assets	\$229,223.20	\$2,175,959.64	\$8,648,379.85

	2024	2025	2026
Cash	\$229,223.20	\$2,175,959.64	\$8,648,379.85
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$53,080	\$36,160	\$19,240
Gross Long Term Assets	\$70,000	\$70,000	\$70,000
Accumulated Depreciation	(\$16,920)	(\$33,840)	(\$50,760)
Liabilities & Equity	\$282,303.19	\$2,212,119.61	\$8,667,619.82
Liabilities	\$41,159.84	\$31,774.44	\$21,810.17
Current Liabilities	\$9,385.40	\$9,964.27	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$9,385.40	\$9,964.27	\$0
Long Term Liabilities	\$31,774.44	\$21,810.17	\$21,810.17
Long Term Debt	\$31,774.44	\$21,810.17	\$21,810.17

	2024	2025	2026
Equity	\$241,143.35	\$2,180,345.17	\$8,645,809.65
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$100,000	\$100,000	\$100,000
Retained Earnings	\$141,143.35	\$2,080,345.17	\$8,545,809.65
Check	\$0	\$0	\$0

 **Help tip**

 **Marketing Consultant 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	\$1,132,855	\$4,220,735

	2024	2025	2026
Net Revenue	\$1,132,855	\$3,087,880	\$7,889,325
Closing Revenue	\$1,132,855	\$4,220,735	\$12,110,060
Starting Expense	\$0	\$966,711.65	\$2,085,389.83
Net Expense	\$966,711.65	\$1,118,678.18	\$1,393,860.52
Closing Expense	\$966,711.65	\$2,085,389.83	\$3,479,250.35
Is Break Even?	Yes	Yes	Yes
Break Even Month	Sep '24	0	0
Days Required	23 Days	0	0
Break Even Revenue	\$689,250.50	\$0	\$0
Consulting Fees	\$198,599.83	\$0	\$0
Project-Based Work	\$392,120	\$0	\$0
Workshops and Training	\$98,530.67	\$0	\$0
Break Even Units			
Consulting Fees	80	0	0

	2024	2025	2026
Project-Based Work	26	0	0
Workshops and Training	49	0	0

Financing needs

 **Help tip**

 **Marketing Consultant Business Plan**

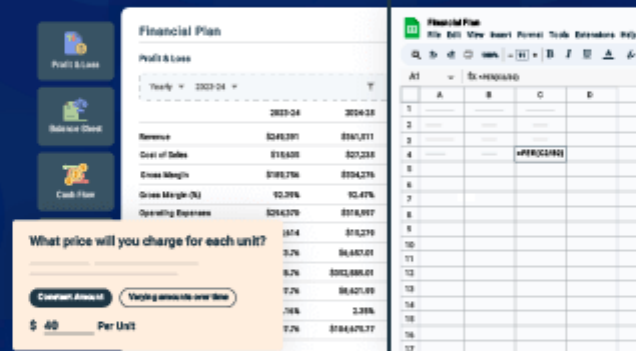
calculate costs associated with starting a marketing consultancy, and estimate your financing needs and how much capital you need to raise to operate your business.

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 a side-by-side comparison. On the left is the Upmetrics 'Financial Plan' interface, which is clean and user-friendly. It features a 'Profit & Loss' section with a table comparing 2023-04 and 2024-03. Below this is a form titled 'What price will you charge for each unit?' with a 'Calculate Amount' button and a 'View generated over time' link. On the right is a standard spreadsheet interface with a grid and various toolbars, representing a more complex and cluttered environment.

	2023-04	2024-03
Revenue	\$245,391	\$261,811
Cost of Sales	\$18,608	\$27,238
Gross Margin	\$196,784	\$234,573
Gross Margin (%)	80.2%	90.4%
Operating Expenses	\$294,329	\$318,967
	1814	\$15,239
	3.2%	\$6,657.01
	0.2%	\$212,895.01
	7.2%	\$6,621.00
	.18%	3,386
	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 other relevant information.

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

