



Mobile Phlebotomy Business Plan


"Convenient Blood Draws at Your Doorstep!"


Business Plan

2024

Prepared By

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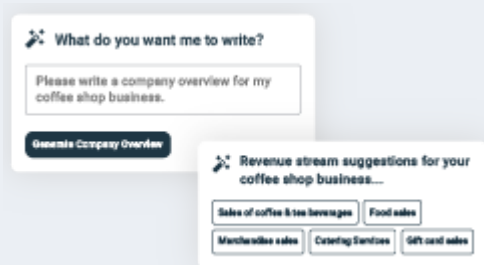
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Business planning that's simpler and faster than you think

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

PrimeCare Mobile Phlebotomy

Start your executive summary by briefly introducing your business to your readers. This section may include the name of your mobile phlebotomy business, its location, when it was founded, etc.

To unlock help try Upmetrics!

Start writing here..

Market opportunity

Help tip

PrimeCare Mobile Phlebotomy

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

PrimeCare Mobile Phlebotomy

Highlight the Mobile phlebotomy 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

PrimeCare Mobile Phlebotomy

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

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Start writing here..

Financial Highlights

Help tip

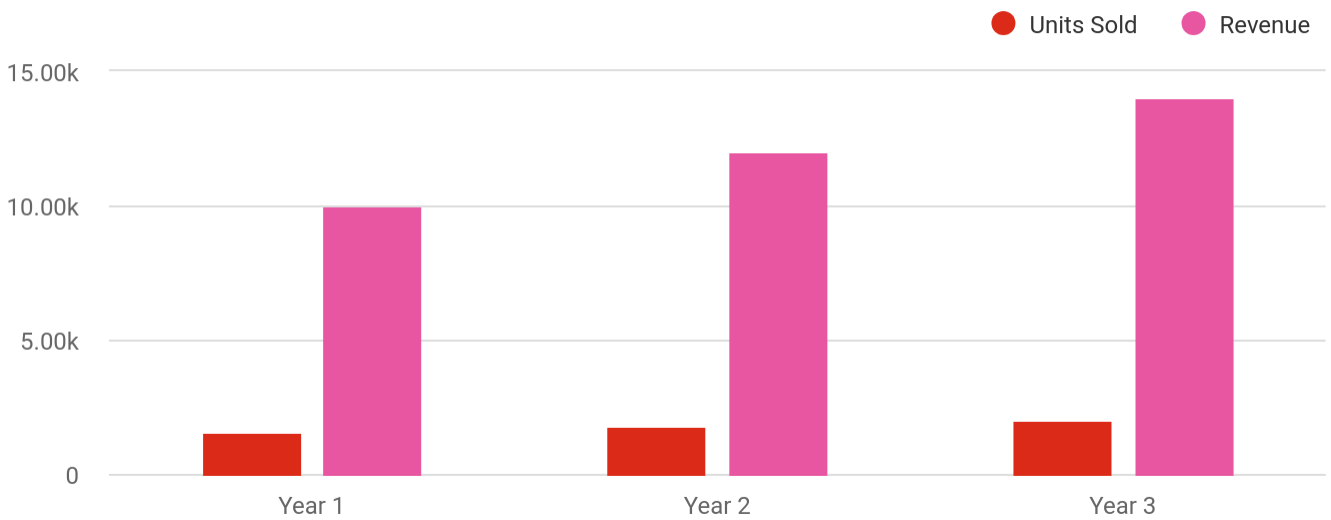
PrimeCare Mobile Phlebotomy

Briefly summarize your financial projections for the initial years of business operations. Include 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

Financial Year	Units Sold	Revenue
Year 3	2,050	\$14,000

 Help tip

 PrimeCare Mobile Phlebotomy

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.

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Help tip

PrimeCare Mobile Phlebotomy

Describe what kind of mobile phlebotomy company you run and the name of it. You may specialize in one of the following mobile phlebotomy businesses:

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Start writing here..

Ownership

Help tip

PrimeCare Mobile Phlebotomy

List the names of your mobile phlebotomy company's founders or owners. Describe how much shares they own and their responsibilities for efficiently managing the business.

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Start writing here..

Business Owners

100%



Lisa Nguyen

100 Shares

Mission statement

Help tip

PrimeCare Mobile Phlebotomy

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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We aim to enhance healthcare accessibility by providing exceptional, patient-focused blood draw services in the comfort of clients' chosen locations. We are committed to professionalism, reliability, and compassion, ensuring a seamless and stress-free experience for every client we serve.



Business history

Help tip

PrimeCare Mobile Phlebotomy

If you're an established tanning salon 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

PrimeCare Mobile Phlebotomy

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

PrimeCare Mobile Phlebotomy

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

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Start writing here..

Target Market

Help tip

PrimeCare Mobile Phlebotomy

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

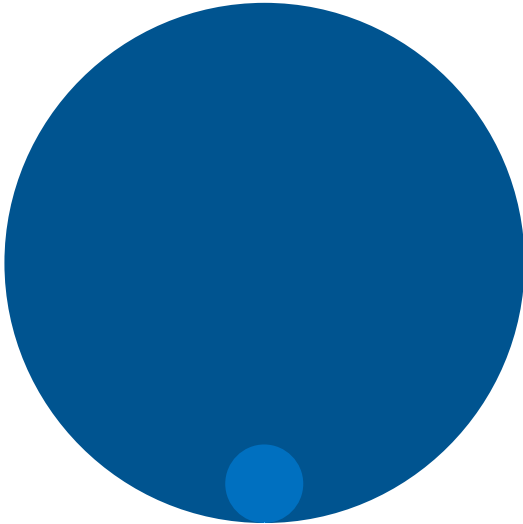
PrimeCare Mobile Phlebotomy

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

Total U.S. population requiring healthcare services, including blood draws.

331M

Served Market

Individuals and organizations needing accessible blood draw services nationwide.


50M

Target Market

Home patients, nursing facilities, and corporate clients in Westminster and neighboring areas.

500k

 **Help tip**

 **PrimeCare Mobile Phlebotomy**

Identify and analyze your direct and indirect competitors. Identify their strengths and weaknesses, and describe what differentiates your mobile phlebotomy services from them. Point out how you have a competitive edge in the market.

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Competitive analysis

PhlebX Mobile Services

[PhlebX Mobile Services] is a regional provider specializing in home phlebotomy for individual clients and small healthcare facilities. They operate across several cities, focusing on fast and affordable services.

Features

- Flexible online scheduling.
- Affordable pricing for routine blood tests.
- Mobile app for real-time appointment tracking.

Strengths

- Established client base in urban areas.
- User-friendly digital tools for scheduling.
- Competitive pricing for routine services.

Weaknesses

- Limited corporate wellness offerings.
- Lack of focus on personalized customer care.
- Inconsistent service quality in suburban regions.

MobileLab Pro

[MobileLab Pro] offers comprehensive diagnostic services, including mobile phlebotomy, for nursing homes, assisted living facilities, and hospitals. Their business emphasizes partnerships with healthcare providers.

Features

Broad range of diagnostic services.

Dedicated teams for facility-based clients.

Advanced data integration with healthcare providers.

Strengths

Strong presence in institutional settings.

Wide range of diagnostic offerings.

Expertise in healthcare data management.

Weaknesses

Limited availability for individual clients.

High service costs for smaller clients.

Less focus on home-based and on-demand care.

On-the-Go Phlebotomy

[On-the-Go Phlebotomy] caters to both individual clients and small businesses, focusing on personalized care and flexible scheduling. They emphasize customer satisfaction and word-of-mouth marketing.

Features

Highly personalized care for individual clients.

Same-day appointment options.

Discounts for group or corporate services.

Strengths

Strong customer relationships and retention.

Excellent reputation for personalized service.

Flexible and accommodating scheduling.

Weaknesses

Limited geographic reach.

Lack of advanced digital tools for service management.

Smaller workforce, leading to occasional scheduling delays.

Market trends

 **Help tip**

 **PrimeCare Mobile Phlebotomy**

Analyze emerging trends in the industry, such as technology, changes in audience 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

PrimeCare Mobile Phlebotomy

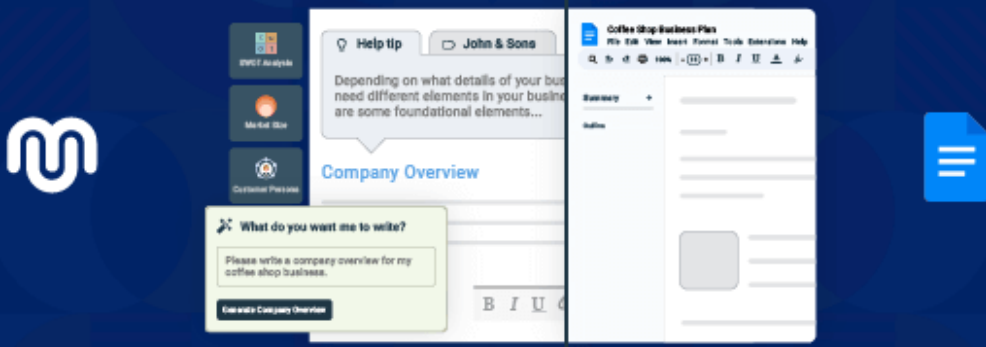
List regulations and licensing requirements that may affect your mobile phlebotomy, such as age restrictions, licensing & permits, zoning regulations, etc.

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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.

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4.

Products and Services

Services

Additional Services



REMEMBER

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

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Help tip

PrimeCare Mobile Phlebotomy

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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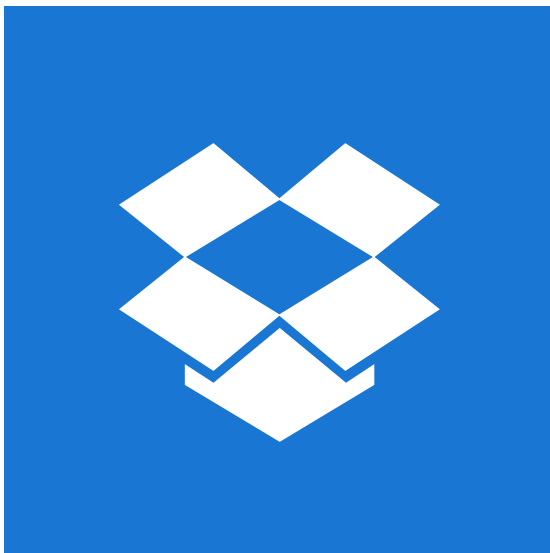
Start writing here..

Help tip

Mention the Mobile phlebotomy services your business will offer. This list may include services like,

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Services



Blood Collection Services

Price: **[\$50] per visit (standard collection)**

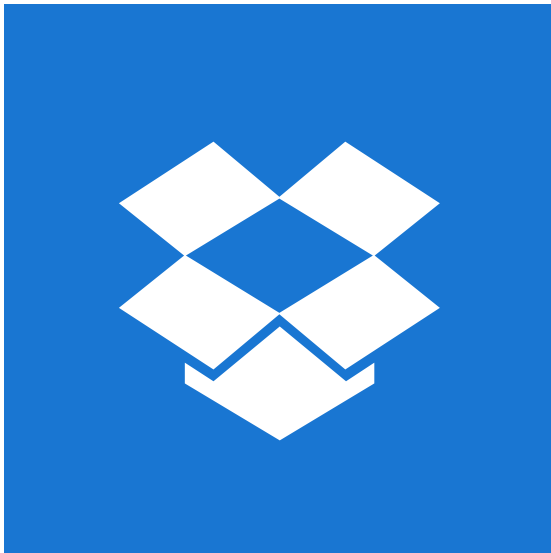
Mobile blood collection for routine and specialized tests, conducted at the client's location.

Specifications

- Appointment scheduling available 7 days a week.
- Certified phlebotomists ensure proper collection and handling of samples.
- Compatible with major healthcare providers and lab networks.
- Includes labeling and safe transportation to partner laboratories.

Diagnostic Testing

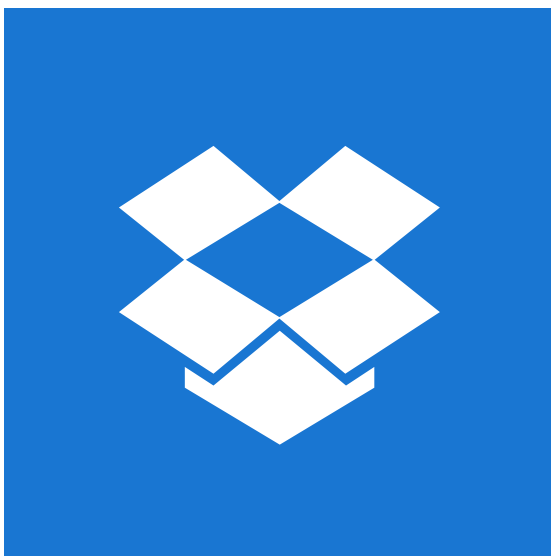
Price: **Starting at [\$75] per test (varies by test type)**



Comprehensive diagnostic testing services, including cholesterol levels, glucose testing, and hormone panels.

Specifications

- Access to advanced diagnostic labs for accurate results.
- Tests include complete blood count (CBC), metabolic panels, and thyroid function tests.
- Results delivered electronically within 24-72 hours.
- Secure HIPAA-compliant data handling.



Therapeutic Monitoring

Price: **[\$100] per session**


Regular blood monitoring for patients undergoing treatment for chronic conditions such as diabetes or heart disease.

Specifications


- Includes medication level assessments and periodic reporting to healthcare providers.
- Personalized schedules for optimal monitoring frequency.
- Professional recommendations based on collected data.
- Suitable for long-term care patients and clinical trials.

Additional Services

 **Help tip**

 **PrimeCare Mobile Phlebotomy**

If you consider offering supplemental services that complement your core offerings, mention them here.

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

PrimeCare Mobile Phlebotomy

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

PrimeCare Mobile Phlebotomy

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

PrimeCare Mobile Phlebotomy

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 to your service.

To unlock help try Upmetrics!

Start writing here..

 **Help tip**

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 Marketing

Active presence on platforms like Facebook, Instagram, and LinkedIn to share educational content and customer success stories.



Email Marketing

Regular newsletters to update clients on services, promotions, and healthcare tips.



Google Ads Campaigns

Targeted pay-per-click (PPC) advertising to capture high-intent searches for mobile phlebotomy services.



Content Marketing

Blog posts and guides on healthcare topics to position [PrimeCare] as an industry thought leader.

Offline




Brochures and Flyers

Distributed in clinics, pharmacies, and local community centers.

 **Help tip**

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

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Sales strategies



Referrals

Introducing a referral program with discounts for clients who bring in new customers.



Local partnerships

Partnering with local clinics, nursing homes, and businesses to create referral networks.




Community engagement

Attending local health fairs and community events to increase brand awareness.

Help tip

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

Offering discounts for repeat customers or annual memberships.



Personalized services

Personalized reminders for routine blood draws or wellness screenings.



Post-service support

Exceptional post-service support to address client inquiries or concerns.

6.

Operations Plan

Staffing & Training

Operational Process

Equipment & Tools



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

PrimeCare Mobile Phlebotomy

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

PrimeCare Mobile Phlebotomy

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

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Start writing here..

Operational Process

Help tip

PrimeCare Mobile Phlebotomy

Outline the processes and procedures you will use to run your Mobile phlebotomy business.


Your operational processes may include planning & scheduling appointments, coordinating with

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Start writing here..

Equipment & Tools

 **Help tip**

 **PrimeCare Mobile Phlebotomy**

Outline the essential medical supplies and equipment used for mobile phlebotomy services. Also, consider setting up technology and software systems to streamline your daily operations.

To unlock help try Upmetrics! 

Start writing here..

7.

Management Team

Founder/CEO

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

PrimeCare Mobile Phlebotomy

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..

Founder/CEO

Help Tip

Mention the founders and CEO of your mobile phlebotomy company, and describe their roles and responsibilities in successfully running the business.

To unlock help try Upmetrics!

Start writing here..



Lisa Nguyen

Founder and CEO - lisa.nguyen@example.com

Lisa Nguyen, a seasoned healthcare professional with over 10 years of experience in phlebotomy and healthcare operations, founded [PrimeCare Mobile Phlebotomy] in [2023].



Before establishing PrimeCare, Lisa worked as a lead phlebotomist at a prominent healthcare provider, where she managed mobile blood draw teams and optimized patient care procedures.

As the CEO, Lisa leads the company's strategic planning, oversees daily operations, and ensures the highest quality standards in service delivery.

Key managers

 **Help tip**

Introduce your management and key members of your team, and explain their roles and responsibilities. It should include, key executives, senior management, and other department managers.

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Start writing here..



John Martinez

Operations Manager - john.martinez@example.com

John Martinez brings 8 years of expertise in healthcare administration, specializing in operational efficiency and logistics.

He earned his Bachelor's Degree in Healthcare Administration from the University of Southern California and previously worked as an operations supervisor for a national mobile healthcare provider.

At [PrimeCare], John is responsible for scheduling, coordinating with clients and phlebotomists, and optimizing logistics to ensure timely service delivery. His meticulous approach to operational planning contributes to PrimeCare's seamless execution of services.



Sarah Bennett

Marketing Manager - sarah.bennett@example.com

Sarah Bennett is a results-driven marketing professional with a strong focus on digital marketing and brand development.

She earned her MBA in Marketing from UCLA Anderson School of Management and has 6 years of experience working in healthcare marketing.

At [PrimeCare], Sarah oversees digital campaigns, builds partnerships, and crafts strategies to expand the company's reach and market share.



Michael Lee

Client Relations Manager - michael.lee@example.com


Michael Lee is a dedicated professional with a strong background in client relationship management and customer service.

He holds a Bachelor's Degree in Business Administration from San Diego State University and has over 5 years of experience in managing client engagement for healthcare service providers.

At [PrimeCare], Michael ensures client satisfaction by managing inquiries, addressing concerns, and fostering long-term relationships.

Organizational structure

 Help tip

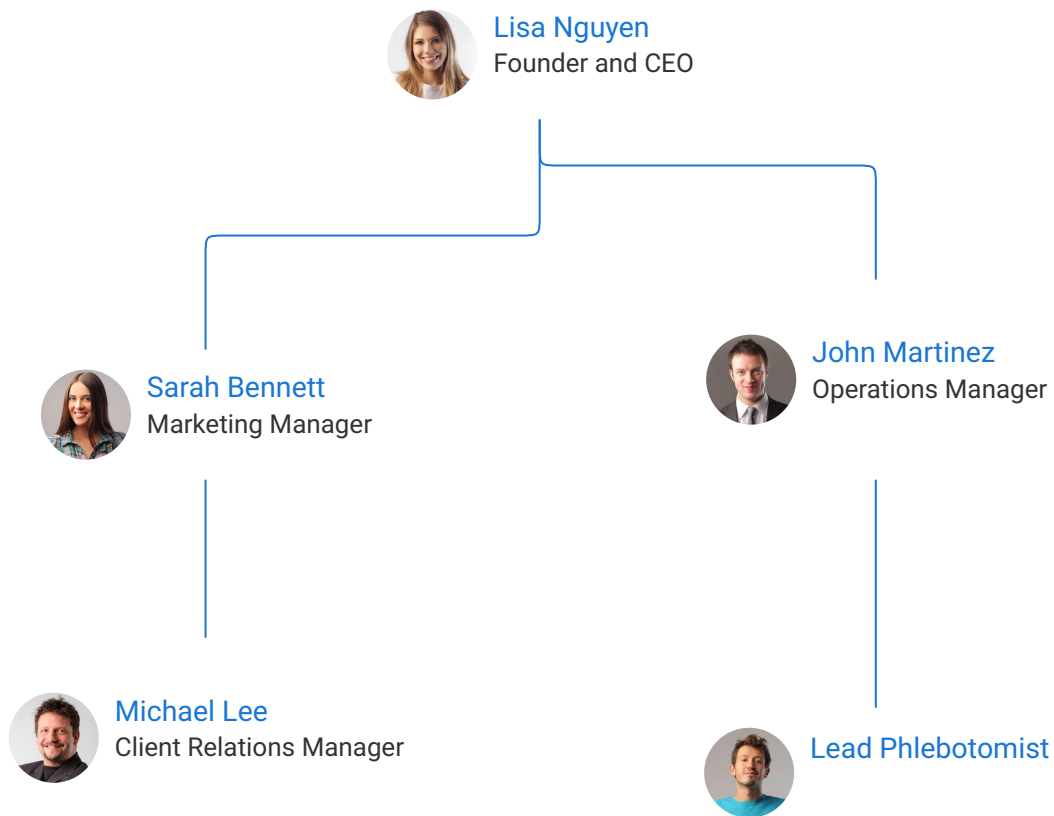
 PrimeCare Mobile Phlebotomy

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

PrimeCare Mobile Phlebotomy

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

To unlock help try Upmetrics!

Start writing here..

Help tip

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

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Board of advisors



Dr. Emily Carter

Healthcare Advisor

Dr. Carter is a licensed physician with 15 years of experience in primary care and mobile healthcare services. She advises PrimeCare on regulatory compliance and patient care standards, ensuring services align with healthcare best practices.



Robert Kane

Business Consultant

Robert is a seasoned business consultant with over 20 years of experience in startups and healthcare businesses. He provides strategic advice on scaling operations, optimizing costs, and market positioning to foster sustainable growth.

8.

Financial Plan

Profit & loss statement

Cash flow statement

Balance sheet

Break-even Point

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

PrimeCare Mobile Phlebotomy

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.

To unlock help try Upmetrics!

Profit & loss statement

	2024	2025	2026
Revenue	\$330,458	\$759,848	\$1,413,404.50
Home Blood Draw Service	\$79,591	\$142,936	\$256,692

	2024	2025	2026
Unit Sales	796	1,429	2,567
Unit Price	\$100	\$100	\$100
Corporate Wellness Screenings	\$123,915	\$198,330	\$317,520.50
Unit Sales	225	361	577
Unit Price	\$550	\$550	\$550
Monthly Membership for Regular Testing	\$126,952	\$418,582	\$839,192
Users	408	974	1,811
Recurring Charges	\$50	\$50	\$50
Cost Of Sales	\$76,689.98	\$121,845.54	\$187,309.45
General Costs	\$76,689.98	\$121,845.54	\$187,309.45
Medical Supplies	\$39,848.67	\$77,797.41	\$134,644.69
Blood Collection Kits	\$13,412.03	\$17,009.57	\$21,572.33
Transportation Costs for Sample Delivery	\$26,436.64	\$60,787.84	\$113,072.36
Labor Costs	\$36,841.31	\$44,048.13	\$52,664.76

	2024	2025	2026
Contract Phlebotomists	\$32,602.93	\$38,980.65	\$46,605.98
Equipment Sterilization	\$4,238.38	\$5,067.48	\$6,058.78
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$253,768.02	\$638,002.46	\$1,226,095.05
Gross Margin (%)	76.79%	83.96%	86.75%
Operating Expense	\$383,869.39	\$408,052.30	\$438,126.71
Payroll Expense (Indirect Labor)	\$354,000	\$365,836.80	\$378,096.12
Phlebotomy Staff	\$149,760	\$155,328	\$161,116.80
Lead Phlebotomist	\$53,760	\$56,448	\$59,270.40
Part-time Phlebotomists	\$96,000	\$98,880	\$101,846.40
Administrative Staff	\$93,360	\$96,302.40	\$99,346.68
Office Manager	\$53,760	\$55,910.40	\$58,146.84

	2024	2025	2026
Administrative Assistant	\$39,600	\$40,392	\$41,199.84
Marketing and Customer Support	\$110,880	\$114,206.40	\$117,632.64
Marketing Specialist	\$38,880	\$40,046.40	\$41,247.84
Customer Support Team	\$72,000	\$74,160	\$76,384.80
General Expense	\$29,869.39	\$42,215.50	\$60,030.59
Marketing Expenses	\$20,021.19	\$32,206.53	\$49,840.42
Online Advertising	\$13,412.03	\$17,009.57	\$21,572.33
Print Marketing Materials	\$6,609.16	\$15,196.96	\$28,268.09
Administrative Costs	\$6,068.20	\$6,228.97	\$6,410.17
Office Supplies	\$1,268.20	\$1,428.97	\$1,610.17
Software Subscriptions	\$4,800	\$4,800	\$4,800
Utilities and Maintenance	\$3,780	\$3,780	\$3,780
Mobile Data and Communication	\$3,600	\$3,600	\$3,600
Vehicle Maintenance	\$180	\$180	\$180
Bad Debt	\$0	\$0	\$0

	2024	2025	2026
Amortization of Current Assets	\$0	\$0	\$0
EBITDA	(\$130,101.37)	\$229,950.16	\$787,968.34
Additional Expense	\$15,950.04	\$13,400.84	\$10,640.04
Long Term Depreciation	\$9,060	\$9,060	\$9,060
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	(\$139,161.37)	\$220,890.16	\$778,908.34
Interest Expense	\$6,890.04	\$4,340.83	\$1,580.03
EBT	(\$146,051.41)	\$216,549.32	\$777,328.30
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$476,509.41	\$543,298.68	\$636,076.20
Net Income	(\$146,051.41)	\$216,549.32	\$777,328.30
Net Income (%)	(44.20%)	28.50%	55%

	2024	2025	2026
Retained Earning Opening	\$0	(\$181,051.41)	\$15,497.91
Owner's Distribution	\$35,000	\$20,000	\$15,000
Retained Earning Closing	(\$181,051.41)	\$15,497.91	\$777,826.21

 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	\$330,458	\$759,848	\$1,413,404.50
Cash Paid	\$467,449.41	\$534,238.68	\$627,016.20
COS & General Expenses	\$106,559.37	\$164,061.04	\$247,340.04
Salary & Wages	\$354,000	\$365,836.80	\$378,096.12
Interest	\$6,890.04	\$4,340.83	\$1,580.03

	2024	2025	2026
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	(\$136,991.41)	\$225,609.32	\$786,388.30
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$65,000	\$0	\$0
Net Cash From Investments	(\$65,000)	\$0	\$0
Amount Received	\$150,000	\$0	\$0
Loan Received	\$100,000	\$0	\$0
Common Stock			
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$50,000	\$0	\$0
Amount Paid	\$65,713.64	\$53,262.84	\$51,023.50
Loan Capital	\$30,713.64	\$33,262.85	\$36,023.51

	2024	2025	2026
Dividends & Distributions	\$35,000	\$20,000	\$15,000
Net Cash From Financing	\$84,286.36	(\$53,262.84)	(\$51,023.50)
Summary			
Starting Cash	\$0	(\$117,705.05)	\$54,641.43
Cash In	\$480,458	\$759,848	\$1,413,404.50
Cash Out	\$598,163.05	\$587,501.52	\$678,039.70
Change in Cash	(\$117,705.05)	\$172,346.48	\$735,364.80
Ending Cash	(\$117,705.05)	\$54,641.43	\$790,006.23

 **Help tip**

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

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Balance sheet

	2024	2025	2026
Assets	(\$61,765.05)	\$101,521.43	\$827,826.23
Current Assets	(\$117,705.05)	\$54,641.43	\$790,006.23
Cash	(\$117,705.05)	\$54,641.43	\$790,006.23
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$55,940	\$46,880	\$37,820
Gross Long Term Assets	\$65,000	\$65,000	\$65,000
Accumulated Depreciation	(\$9,060)	(\$18,120)	(\$27,180)
Liabilities & Equity	(\$61,765.05)	\$101,521.42	\$827,826.21
Liabilities	\$69,286.36	\$36,023.51	\$0
Current Liabilities	\$33,262.84	\$36,023.50	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$33,262.84	\$36,023.50	\$0

	2024	2025	2026
Long Term Liabilities	\$36,023.52	\$0.01	\$0
Long Term Debt	\$36,023.52	\$0.01	\$0
Equity	(\$131,051.41)	\$65,497.91	\$827,826.21
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	(\$181,051.41)	\$15,497.91	\$777,826.21
Check	\$0	\$0	\$0

 **Help tip**

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 Point

	2024	2025	2026
Starting Revenue	\$0	\$330,458	\$1,090,306
Net Revenue	\$330,458	\$759,848	\$1,413,404.50
Closing Revenue	\$330,458	\$1,090,306	\$2,503,710.50
Starting Expense	\$0	\$476,509.41	\$1,019,808.09
Net Expense	\$476,509.41	\$543,298.68	\$636,076.20
Closing Expense	\$476,509.41	\$1,019,808.09	\$1,655,884.29
Is Break Even?	No	Yes	Yes
Break Even Month	0	Oct '25	0
Days Required	0	29 Days	0
Break Even Revenue	\$476,509.41	\$923,322.22	\$0
Home Blood Draw Service	\$0	\$192,075.63	\$0
Corporate Wellness Screenings	\$0	\$281,765.92	\$0
Monthly Membership for Regular Testing	\$0	\$449,480.67	\$0

	2024	2025	2026
Break Even Units			
Home Blood Draw Service	0	1,921	0
Corporate Wellness Screenings	0	512	0
Monthly Membership for Regular Testing	0	878	0

Financing needs

 **Help tip**

 **PrimeCare Mobile Phlebotomy**

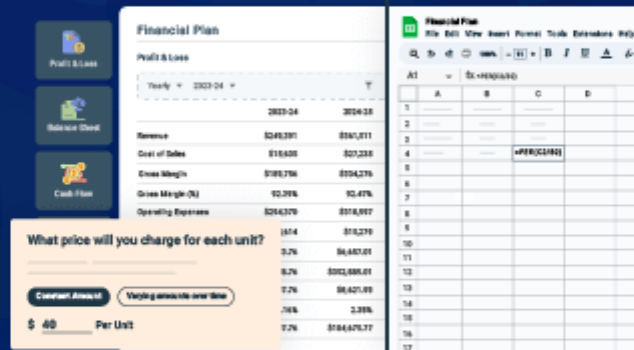
Calculate costs associated with starting a mobile phlebotomy business, and estimate your financing needs and how much capital you need to raise to operate your business.

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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. On the left is the Upmetrics 'Financial Plan' interface, which is clean and user-friendly. It features a sidebar with 'Profit & Loss', 'Balance Sheet', and 'Cash Flow' options. The main area displays a 'Profit & Loss' report for 2023-24, with a table of financial metrics and a calculator for unit pricing. On the right is a standard spreadsheet interface, cluttered with formulas and grid lines, representing the traditional method.

	2023-24	2024-25
Revenue	\$245,391	\$261,811
Cost of Sales	\$18,608	\$27,238
Gross Margin	\$196,784	\$234,574
Gross Margin (%)	80.2%	90.4%
Operating Expenses	\$294,329	\$318,967
	1814	\$15,239
	3.2%	\$6,857.01
	0.2%	\$202,895.01
	7.2%	\$6,827.00
	.78%	3.38%
	7.2%	\$184,875.77



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.

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9.

Appendix

[Embed Link](#)



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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