

LOGO

# Retail Store

*Every day you get our best.*

# Business Plan [YEAR]

 John Doe

 10200 Bolsa Ave, Westminster, CA, 92683

 (650) 359-3153

 info@upmetrics.co

 <https://upmetrics.co>

CONFIDENTIAL

# Table of Contents

---

<b>Executive Summary</b>	<b>4</b>
Company Profile Summary	5
Market Research Summary	5
Marketing Summary	5
Finance Summary	5
<b>Company Profile</b>	<b>7</b>
Business Overview	8
Company History	8
Management	8
Location	8
Legal Structure	9
Vision & Mission	9
<b>Market Research</b>	<b>10</b>
Industry Profile & Market Size	11
Local Market	11
Target Market	11
Competitor Analysis	12
GT Pet Foods	12
Features	12
Strengths	12
Weaknesses	12
Smith Pet Boutique	12
Features	13
Strengths	13
Weaknesses	13
Keys to Success	13
Customer Survey Summary	13
SWOT Analysis	13
<b>Sales &amp; Marketing</b>	<b>15</b>
Products and Services	16
Pricing Strategy	16
Marketing Strategy	16
Primary Marketing Activities	16
Marketing Objective	17

Positioning Statement .....	17
The Sales Process .....	17
Strategic Alliances .....	17
<b>Operations</b> .....	<b>18</b>
Location(s) .....	19
Legal Issues .....	19
Insurance Issues .....	19
Human Resources (Or Team) .....	20
JOHN DOE .....	20
JOHN DOE .....	20
JANE DOE .....	20
Process/Production .....	20
Risk Assessment .....	20
<b>Financial Plan</b> .....	<b>22</b>
Startup Funding & Capital .....	23
Start-Up Costs .....	23
Sales Forecast .....	24
Cash Flow .....	24
Projected Profit & Loss .....	24
<b>Appendix</b> .....	<b>25</b>

# Easy to use Business Plan Software

Get started using a business plan template is always the fastest way to write your business plan, but as you know, you can't just fill in the blanks along with a template. You will need a collaborative tool that guides you on every step of your planning.

**Upmetrics** can help. With Upmetrics, you can easily bring your team to write a professional business plan with automated financial forecasts. You can also do:



## 200+ Sample business plans

Get access to hundreds of sample business plans covering almost all industries to kick start your business plan writing. This helps you to get an idea how the perfect business plan should look like.

[View Sample Business Plans](#)



## Step-By-Step Guide

You'll receive step-by-step instruction as soon as you select any business plan template. We made business planning easy with prompt help and examples on every step of your business plan writing.

[See How It Works](#)



## Conduct accurate financial projections

Do not worry about not having accounting skills. With Upmetrics, Simply enter your sales and costs figures, and we'll prepare all of your monthly/quarterly and yearly financial projections.

[See How It Works](#)



**Need professional business plans faster?**

Upmetrics is easy to use business planning tool for over 50K businesses

**Create your business plan today!**



# 1.

## Executive Summary

Company Profile Summary

Market Research Summary

Marketing Summary

Finance Summary



#### REMEMBER

An Executive Summary is the first and most basic piece of the accomplishment of the business plan. The Executive Summary offers an abstract of your business plan and features the key focuses you need to address in the rest of your document. This chapter of your business plan is urgent in light of the fact that it is the place you should catch the reader's attention.

To unlock help try Upmetrics!

## Company Profile Summary



#### TIP

This section is an overview of your basic business. It describes what business you are in, what your business will do, what are your goals for your business. This section includes the following:

To unlock help try Upmetrics!

*Start Writing here...*

## Market Research Summary



#### TIP

This section is a quantitative and qualitative assessment of a market. It looks into the size of the market both in volume and in value, the various customer segments and buying patterns, the competition, and the economic environment in terms of barriers to entry and regulation.

To unlock help try Upmetrics!

*Start Writing here...*

## Marketing Summary



#### TIP

This section should define the basics of your marketing plan. It should disclose who the customers are, where the business is conducted, and the products and services that will be sold. List a set of marketing strategies are you're going to apply.

To unlock help try Upmetrics!

*Start Writing here...*

## Finance Summary



**TIP**

Your financial summary should provide your company's current value as accurately as possible.

In this section, you should consider adding charts, tables, and graphs to guide your investors and readers with the figures in your d

To unlock help try Upmetrics!

*Start Writing here...*

# 2.

## Company Profile

Business Overview

Company History

Management

Location

Legal Structure

Vision & Mission



#### REMEMBER

Note: Don't try to get creative when writing this section. Use easy-to-read, common terminology that people can relate to. You never want to assume that those reading your business plan have the same level of technical knowledge that you do.

To unlock help try Upmetrics!

## Business Overview



#### TIP

It should include your business structure, Established year, legal name, location, and the goods or services offered.

To unlock help try Upmetrics!

*Start Writing here...*

## Company History



#### TIP

This section is not for startups, If it's already an established organization, let's say a few words about company history and achievements.

To unlock help try Upmetrics!

*Start Writing here...*

## Management



#### TIP

In the Management section, the information included should show that your retail business has the necessary human resources to be successful. This part answers questions about your key management personnel and their backgrounds, explains how the store will be staffed, and details all personnel compensation and benefits, including employment p

To unlock help try Upmetrics!

*Start Writing here...*

## Location



**TIP**

Where does it locate? if you have multiple branches write down about them all.

To unlock help try Upmetrics!

*Start Writing here...*

## Legal Structure



**TIP**

Describe legal structure here

To unlock help try Upmetrics!

*Start Writing here...*

## Vision & Mission



**TIP**

This is when you really start getting into the core of why your business exists, what you hope to accomplish, and what you actually stand for.

To unlock help try Upmetrics!

*Start Writing here...*

# 3.

## Market Research

Industry Profile & Market Size

Local Market

Target Market

Competitor Analysis

Keys to Success

Customer Survey Summary

SWOT Analysis

## Industry Profile & Market Size

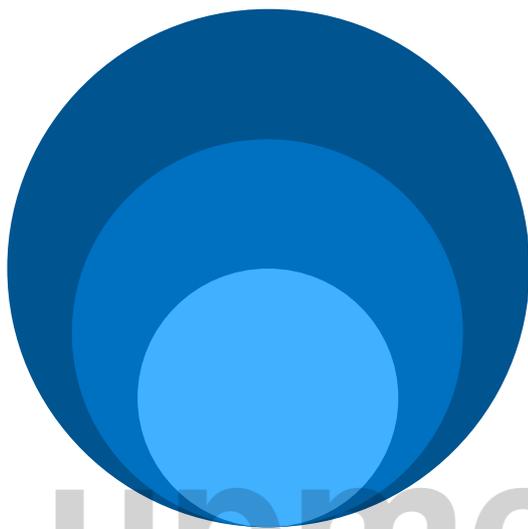


TIP

The industry profile section describes data centered on an area of business that outlines and describes the major components of that area. Profiles often provide an overview of the industry and may make projections about future trends. Based on market research describe the size of your market. The example is as shown below :

To unlock help try Upmetrics!

Start Writing here...



Available Market

10k

Served Market

7k

Target Market

5k

## Local Market



TIP

It is a retail industry, there should always include some data related to the local market. What is the location of the current market? where the potentials customers are located around the market?

To unlock help try Upmetrics!

Start Writing here...

## Target Market



TIP

To define a target market for your business plan, you should research the potential buying audience for your product. This could range from a few thousand individuals if you are opening a retail store in a small town. If you are catering to the consumer market, narrow your potential customer base to a defined demographic group. By doing so, your business

To unlock help try Upmetrics!

Start Writing here...



TIP

It's important for new businesses to complete a competitive analysis during the business planning stage. Competitive intelligence can also be useful for marketing, pricing, managing, and other strategic planning for retailers at any stage of their business. Before you can know your competitive edge, you must know your competitor. Here is an example of a competitor

To unlock help try Upmetrics!

## Competitor Analysis

### GT Pet Foods



#### Features

Open to customer feedback on products to carry

#### Strengths

Canada's largest chain of pet food stores specializing in natural, holistic and organic foods and supplements!

Health food store for pets

#### Weaknesses

Limited selection of products and services

Each store does not have the same level of knowledge ability or service

### Smith Pet Boutique



## Features

Responsive to the local community in offering premium pet food products and pet care advice

## Strengths

Locally responsive premium pet food store – owner is extremely knowledgeable and known in the community

High-quality products

## Weaknesses

New store so will need time to establish credibility and build reputation

## Keys to Success



**TIP**

List keys to success your business, For retail business most effective keys to success if store location. How many possibilities of getting more customers based on location?

To unlock help try Upmetrics!

*Start Writing here...*

## Customer Survey Summary



**TIP**

The customer survey is an essential part of your business plan, By conducting a survey you know what are the market needs?

What exactly the customers are looking for?

To unlock help try Upmetrics!

*Start Writing here...*

## SWOT Analysis

## Strengths

---

- Experience and understanding of the fashion industry
- Unique shopping experience with exceptional customer service
- Great downtown location
- The large and growing consumer base

S

## Weaknesses

---

- An untested market in Pleasantville
- While the market is large, it is a niche market (Baby Boomers)

W

## Opportunities

---

- The outstanding shopping experience will lead to repeat business
- Growing online clothing store Booming Boutique
- Establish a Booming Boutique clothing line

O

## Threats

---

- Cost and effectiveness of marketing to women “Baby Boomers”
- New retail shops that may or may not open in the future

T

# 4.

## Sales & Marketing

Products and Services

Pricing Strategy

Marketing Strategy

Primary Marketing Activities

Positioning Statement

The Sales Process

Strategic Alliances

## Products and Services



TIP

This section of the business plan is most important to retailers in the midst of developing a business. The Products and Services section describes the goods and services offered, how they are provided, information about the vendors, and any plans for the future growth of your product lines.

To unlock help try Upmetrics!

*Start Writing here...*

## Pricing Strategy



TIP

Describe which pricing strategies you are going to use to acquire more and more customers? Before you can determine which retail pricing strategy to use in determining the right price for your products, you must consider the product's direct costs and other related expenses. These two key elements of overall product cost are termed the cost of goods and oper...

To unlock help try Upmetrics!

*Start Writing here...*

## Marketing Strategy



TIP

A retailer needs to decide as to what it wants to achieve for its customers. It has to decide the target market and then select the appropriate combination of product, price, place, and promotion to create his marketing strategies.

To unlock help try Upmetrics!

*Start Writing here...*

## Primary Marketing Activities



TIP

List out the marketing activities or campaigns you are going to run as a part of your marketing strategy.

To unlock help try Upmetrics!

*Start Writing here...*



TIP

The overall objective of retail marketing is creating and developing services and products that meet the specific needs of customers and offering these products at competitive, reasonable prices that will still yield profits.

To unlock help try Upmetrics!

## Marketing Objective

*Start writing here...*

## Positioning Statement



TIP

The positioning statement is defined “as the design and implementation of a retail mix to create an image of the retailer in the customer's mind relative to its competitors.

To unlock help try Upmetrics!

*Start Writing here...*

## The Sales Process



TIP

This section describes how you are going to sell your products or services. Don't go into detail just define the process with a few steps.

To unlock help try Upmetrics!

*Start Writing here...*

## Strategic Alliances



TIP

List of strategic alliances with other retail outlets or service providers from where you can get leads.

To unlock help try Upmetrics!

*Start Writing here...*

# 5.

## Operations

Location(s)

Legal Issues

Insurance Issues

Human Resources (Or Team)

Process/Production

Risk Assessment



### REMEMBER

This chapter describes the outlines for separate operations and development sections for your retail business plan. Under operations, divide your contents by typical business functions such as Locations, accounting, administration, marketing, legal issues, human resources and technology, Production, and Risk assessment.

To unlock help try Upmetrics!

## Location(s)



### TIP

Detailed descriptions about store locations, Proper site selection for your business influences whether you succeed or fail in making money. Your business location analysis should take into account demographics, psychographics, census, and other data. Although a great location may not guarantee success, a bad location will almost always

To unlock help try Upmetrics!

*Start Writing here...*

## Legal Issues



### TIP

For the retailer, the Most common Legal issues are considered as Business License, Food safety license, Non-Disclosure Agreements, Zoning, partnership agreements, etc.

To unlock help try Upmetrics!

*Start Writing here...*

## Insurance Issues



### TIP

Store insurance requirements to save it from physical disasters.

To unlock help try Upmetrics!

*Start Writing here...*



TIP

So-called retail Staff, Includes Management Team, Salesman Team and Supplier Team, etc.

To unlock help try Upmetrics!

## Human Resources (Or Team)



**JOHN DOE**

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

Describe his skills, Achievements and experience.



**JOHN DOE**

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

Describe his skills, Achievements and experience.



**JANE DOE**

*[jane.doe@example.com](mailto:jane.doe@example.com)*

Describe her skills, Achievements and experience.

## Process/Production



TIP

For retail, Goods are coming from either self-manufacturing units or some third party suppliers, Define your inventory process and goods supply chain. Also, describe where the raw materials are coming from?

To unlock help try Upmetrics!

*Start Writing here...*

## Risk Assessment



**TIP**

This section is for actions that has been undertaken for assessing risks.

To unlock help try Upmetrics!

*Start Writing here...*

# 6.

## Financial Plan

Startup Funding & Capital

Start-Up Costs

Sales Forecast

Cash Flow

Projected Profit & Loss



**REMEMBER**

One of the more difficult parts of the business plan, the Financial Plan, involves the company's revenue and profitability model. This part of your business plan assesses the amount of capital the retail business needs. It also addresses the proposed use of these funds as well as their expected future earnings. The financial plan includes Break-even Analysis, Sales F

To unlock help try Upmetrics!

## Startup Funding & Capital



**TIP**

Enter the funding information, How much money you're going to borrow either from investors or bank loans?

To unlock help try Upmetrics!

*Start Writing here...*

### Projected Funding Data

Here you can embed your projected funding data from financial forecasting.

## Start-Up Costs



**TIP**

We have automated financial forecasts to calculate summary startup costs, Input numbers into financial modeling and it all calculate your summary costs and necessary metrics.

To unlock help try Upmetrics!

*Start Writing here...*

### Projected Personnel Data

Here you can embed your projected personnel (employees) data from financial forecasting.

### Projected Expense Data

Here you can embed your projected expenses data from financial forecasting.



TIP

Choose the product revenue stream in a financial modeling tool, enter the price, production volume, and inventory tracking information it will calculate revenue summaries.

To unlock help try Upmetrics!

## Sales Forecast

### Projected Revenue Data

Here you can embed your projected revenue data from financial forecasting.



TIP

Under this section add a cash flow report to generate reports use our automated financial forecasting tool.

To unlock help try Upmetrics!

## Cash Flow



TIP

Under this section add an income statement report to generate reports use our automated financial forecasting tool.

To unlock help try Upmetrics!

## Projected Profit & Loss

7.

Appendix



**TIP**

A business plan's appendix is like its own mini-library. It holds the entire plan's supporting documents in a clear, well-organized fashion. The appendix consists of an array of documentation that ranges from receipts and bank statements to contracts and inventories. It should be used on an as-needed basis and include only essential information.

To unlock help try Upmetrics!

*Start Writing here...*



upmetrics.co

# Want to make it more presentable?

## Want help tips on each section?

You'll save time and can write your professional business plan effectively and faster with Upmetrics' business plan software.

- Every feature you need to convert your great business idea into a reality.
- Write your plan easily and faster without any hassles.
- Structure your idea and create stunning pitches that awe your investors.
- Get access to Upmetrics software, invite your team members and start writing your business plan.

### 1. Get tried and tested tips

Upmetrics business plan builder gives you everything you need to stay in sync and guides you on every step of your business plan writing.

### 2. Write an interactive plan

Use our business plan sections - competitive Analysis, comparison tables, SWOT Analysis, charts, timelines, milestones, etc to create a visually impactful business plan.

### 3. Stunning business plan cover pages

Upmetrics business plan builder comes with beautifully designed cover pages. Choose professional, creative cover pages to make your business plan stand out.

### 4. Financial forecasting

With Upmetrics you don't have to worry about navigating complex spreadsheets. Just input your numbers and we'll provide you with well-structured financial reports that you and your investors understand.

### 5. Share easily with anyone

Upmetrics plans are easily shareable in pdf and word documents. And if either doesn't work, you can share it with a quick link too and track the reader's activity!

### 6. Real-time and Collaborative

Invite your team members to initiate conversations, discuss ideas and strategies in real-time, share respective feedback, and write your business plan.

Join over 100k+ entrepreneurs who have used Upmetrics to create their business plans.

Start writing your business plan today