

[Your Company Name]

[Your Tagline]

Simple Business Plan **[Year]**

Six chapters, for when the decision does not need forty pages

Prepared by _____

Date _____

How to use this template

1. Fill in the easy factual sections first. Company overview, products and the team are mostly things you already know.
2. Do the market section with a browser open. Competitor prices, what reviews complain about.
3. Build the financials from one unit upward: what you charge, what it costs you, how many you sell in a week.
4. Write the executive summary last, once the other sections give you something to summarise.
5. Delete what does not apply. A shorter plan that is all relevant beats a padded one.

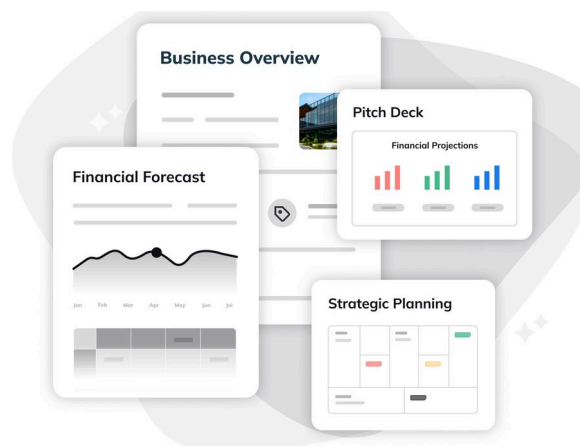
Six chapters instead of eleven. This is the version for a landlord, a supplier, a partner, or for thinking the idea through yourself. It is not enough for a bank or an SBA loan: those want the full set of sections and three years of financial detail.

Rather not write it from scratch?

Upmetrics asks you questions and drafts each section, then builds the projections, cash flow and balance sheet so the numbers stay consistent.

4.9 Capterra
★★★★★

4.9 G2
★★★★★



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Mariia Yevlash

Student, Sumy State University - Ukraine

★★★★★

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

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The plan

What the business does

What you sell, who buys it, and what they pay.

Who it is for

A real description of the customer. Where they get this today, and why they would switch.

Who else is already doing it

Three named competitors with their prices. The section people skip, and the one a lender reads.

How you reach people

The two or three channels you will actually use, and what each costs.

The money

Revenue, costs and the running bank balance, month by month for a year. The one section a short plan cannot drop, and the one a reader checks first. Use the table below.

What you need and what it buys

If you are asking for money, the amount and what it is spent on. If not, what you are funding it from.

Twelve month cash forecast

CATEGORY	MONTHS 1-3	MONTHS 4-6	MONTHS 7-9	MONTHS 10-12
Revenue				
Cost of sales				
Staff and owner pay				
Rent and utilities				
Marketing				
Other costs				
Total costs				
Profit				
Closing bank balance				

The one table a short plan still needs. Revenue in, costs out, and the running bank balance underneath.

Funding Needs

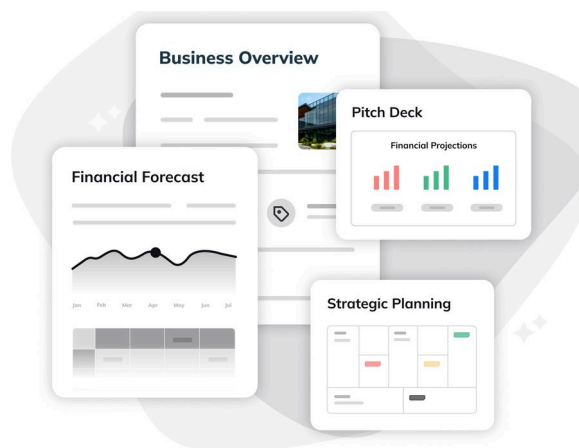
How much you need in total, where it comes from, and over what period you would repay it.

Use of Funds

What the money actually buys, line by line. A lender compares this against the amount you asked for.

The plan is the easy half. The financials are the half that gets checked.

Upmetrics builds the projections, cash flow and balance sheet so they stay consistent with each other as you change a number.



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