

Business Plan

[Company name] | Prepared by [name], [date]

1. Services and subniche

- The services we sell: _____
- The 1 or 2 that make us the most money: _____
- The work we want more of: _____
- The work we want less of, or will stop: _____

2. Target customers and service area

- Our best customer (residential/commercial, property type, what they value): _____
- Where we work (towns, zip codes, or a radius from the shop): _____
- Why a customer picks us over the next company: _____

3. Pricing and margins

- Our burdened labor cost per hour: _____
- Our overhead per labor hour (or % of direct cost): _____
- The net margin we're aiming for: _____%
- Price for each main service (from the calculator):
- Service: _____ Price: _____ Margin: _____%
- Service: _____ Price: _____ Margin: _____%
- Service: _____ Price: _____ Margin: _____%

4. Crews and hiring

- People we need at the peak of the season: _____
- Roles, and what each one pays: _____
- Where we'll find them: _____
- When we'll start hiring: _____
- Who trains new people, and how: _____

5. Marketing and how we'll measure it

For each source (referrals, Google search, Google Business Profile, Local Services Ads, Facebook, mail, signs, other):

Source	Monthly spend	Booked jobs expected	Value of those jobs

- How we'll track which source each booked job came from: _____
- The number we'll judge marketing by (booked jobs and their value, not leads): _____

6. Seasonal cash plan

- Busy season: from _____ to _____
- Payroll peaks in: _____
- Big bills and when they land (insurance, equipment, taxes): _____
- How we'll cover the slow months: _____
- Cash we want in reserve before winter: _____

7. 12-month numbers

Month	Revenue	Direct costs (labor, materials, equipment)	Overhead	Profit	Notes
Month 1					
Month 2					
Month 3					
Month 4					
Month 5					
Month 6					
Month 7					
Month 8					
Month 9					
Month 10					
Month 11					
Month 12					

Review dates: Before the season _____ Mid-season _____ End of season _____

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