[LOGO]

[COMPANY NAME]

Business Plan

[DATE]

[YOUR NAME, JOB TITLE]

[ADDRESS]

[PHONE] **|** [EMAIL]

[WEBSITE]

# Executive Summary

## Company History

*[Summarize your company*’*s history and how you got to this point.]*

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| **EXAMPLE**  Tree Care Pros was founded in 2019 after its founder, Alex, faced an unexpected layoff from his corporate job. A neighbor asked Alex if he could help with a tree trimming project, as their regular service had become unreliable and often missed appointments.  Alex completed the job with great care, leaving his neighbor impressed with the results. Encouraged by the positive feedback, he invested in basic equipment and reached out to more neighbors, offering dependable tree care services. Within weeks, Alex had a full schedule and was ready to expand.  Today, Tree Care Pros is thriving, offering a comprehensive range of tree services, employing three skilled workers, and proudly boasting over 150 five-star reviews from satisfied customers. |

## Mission, Vision & Values

*[Describe why your business exists, what you want it to become, and what qualities are important to you.]*

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| **EXAMPLE**  **Our Mission:** To provide customers with an exceptional tree care experience.  **Our Vision:** To become the leading tree care service in Richmond.  **Our Values:**   * **Integrity:** We uphold honesty in all our interactions. * **Quality:** We are committed to delivering top-notch services. * **Timeliness:** We respect our clients' time by being prompt and reliable. * **Collaboration:** We believe in teamwork and open communication. * **Customer Focus:** We prioritize the needs and satisfaction of our clients. |

## Business Goals

*[List the business goals that you want to achieve this year. Include a way to measure success.]*

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| **EXAMPLE**  In 2024, Tree Care Pros will:   * Hire one additional team member * Purchase a second company truck and a second set of specialized tree care equipment * Establish a second service team * Acquire 25 new weekly tree maintenance clients * Secure 15 new seasonal tree removal clients * Achieve $200,000 in revenue |

## Competitive Advantage

*[Describe what makes you different from any other lawn care business in your area.]*

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| **EXAMPLE**  Tree Care Pros is the only tree service company in Richmond, Virginia, that prioritizes customer satisfaction above all else. We ensure our work is done right the first time, and if a client is ever unsatisfied, we actively collaborate with them to resolve any issues.  Additionally, Tree Care Pros will be the only tree service in the area to offer specialized tree removal services during the winter months. |

# Business Overview

*[Describe the services you offer, where, who you work with, and what type of business structure you have. List any assets and startup costs associated with the business.]*

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| **EXAMPLE**  Tree Care Pros is a sole proprietorship dedicated to providing exceptional tree care services to residential clients in Richmond, Virginia.  Operating out of owner Jamie’s home garage, the company is equipped with:   * 2 chainsaws and 1 wood chipper * 1 stump grinder and 1 pruning saw * 3 sets of climbing gear and safety equipment * 1 pickup truck * 3 sets of personal protective equipment (PPE) * 1 laptop, 1 tablet, and 1 printer   With this setup, Tree Care Pros is well-prepared to meet the diverse needs of its clients while ensuring safety and efficiency. |

# Company Services

*[List the services you provide and how often.]*

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| **EXAMPLE**  Tree Care Pros provides a comprehensive range of tree care services for residential clients, including tree trimming, pruning, stump grinding, tree removal, and yard cleanup.  Tree trimming services are typically recommended every 1 to 3 years, depending on the type of tree and its growth rate. Fast-growing species may need trimming annually, while slower-growing trees might require it every few years. Regular inspections can help determine the best schedule for maintaining tree health and aesthetics. |

# Service Pricing

*[List your pricing, whether that*’*s hourly, per service, or per square foot.]*

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| **EXAMPLE**  Tree Care Pros charges a flat rate of $50 per hour for our services. Each job will receive a customized estimate based on specific needs and requirements. Additionally, materials are billed at market rate plus a 10% markup. |

# Market Analysis

*[Describe your ideal client, including demographics, price point, and buying behavior.]*

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| **EXAMPLE**  **Our ideal customer profile includes:**   * Homeowners in the Richmond area * Household incomes of $55,000 or more * Ages 25-65, including busy professionals and families who may not have time for tree maintenance * Properties with average-sized yards located in neighborhoods we currently serve   This focuses on Richmond-area residents who value professional tree care and may lack the time or equipment to handle their own tree services. |

# Competitor Analysis

*[Identify local competitors, what they do well, and where they can improve. Include as much detail as you can]*

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| **EXAMPLE**  **Tall Timber Tree Care** is a state franchise offering both tree services and landscaping, giving clients the convenience of handling all their outdoor needs with one company. However, they don't provide on-my-way texts or follow up after services like we do.  **Branch & Root Tree Specialists** is a well-established local provider serving Richmond since 1998. While they work quickly, they often receive negative reviews for lack of precision, such as sloppy trimming or incomplete cleanup.  **EcoTree Arborists** are known for their exceptional tree care and eco-friendly methods that promote long-term tree health. However, their services come at a premium, with a long waiting list, making it difficult for clients to schedule appointments and afford their high prices. |

# Marketing & Sales

*[List your current sales and marketing tactics, as well as any new ones you*’*ll be using this year.]*

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| **EXAMPLE**  **Tree Masters** currently uses the following marketing strategies:   * Word of mouth (client referrals and positive reviews) * Facebook advertising * Google Search and Local Services ads * Branded yard signs placed on properties while our team is working   In 2024, we plan to expand our efforts with:   * **Direct mail postcards** targeted to newly developed neighborhoods. Many of these homes still need tree planting and maintenance, so the postcards will promote our tree planting services and offer a special rate on ongoing care.   + **COST**: $940 to design, print, and distribute 500–1,000 postcards by zip code. * **Email marketing** to notify clients about new services, contract renewals, and price changes. Subscribers will also receive useful tree care tips and seasonal maintenance advice.   + **COST**: Free email platform + 2 hours of staff time each week.   Although **Tree Masters** doesn’t have a dedicated sales team, every employee is trained to engage with curious neighbors during jobs and offer information about our services. |

# Employee Planning

*[List all employee wages in line with local rates, number of employees, and hiring costs, as well as jobs per day and revenue per job.]*

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| **EXAMPLE**  **Kyle** is currently in the process of interviewing candidates for a full-time tree care laborer. This individual may or may not have prior experience in tree service, but the main requirement is a strong work ethic and the ability to handle physically demanding tasks safely.  Bringing on this new hire will enable the creation of a second service crew, which will significantly expand **Tree Masters'** operational capacity. With this additional crew, we aim to reach our target of acquiring 20 new tree care clients for regular maintenance services. Assuming a conservative estimate of $150 per job (covering tree pruning, trimming, and basic maintenance), these new clients would generate an additional $156,000 in annual revenue.  **Employee Salaries:**   * Owner: $28,000 * Crew Leader: $26,000 * Senior Tree Technician: $22,000 * New Hire: $20,000   **Total Payroll Budget:** $96,000  This payroll budget reflects the growth of the business, with the new hire providing the necessary capacity to meet service demand and drive revenue expansion. |

# Financial Planning

*[Include your business model, any funding or loans, operating costs, sales projections, profit-loss and cash flow statements, and any other relevant financial statements.]*

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| **EXAMPLE**  **2023 Monthly Recurring Revenue (MRR):** $13,000 **2023 Annual Revenue:** $156,000  **Projected 2024 MRR:** $17,500 **Projected 2024 Annual Revenue:** $210,000  **2024 Budget:**   * **Payroll:** $110,000 (reflecting staff growth and raises) * **Vehicles and equipment (loan payments, maintenance):** $18,000 (includes additional equipment for a second crew) * **Fuel (including second vehicle):** $17,500 (accounting for rising fuel costs) * **Insurance:** $2,500 (increased coverage for expanded operations) * **Marketing:** $8,000 (expansion into digital and local advertising) * **Hiring and training:** $6,000 (for onboarding new employees and certifications) * **Software subscriptions (Jobber, QuickBooks, etc.):** $1,000 (software necessary for managing schedules, billing, and finances) * **Miscellaneous (e.g., phone plan, office supplies, incidentals):** $6,000   **TOTAL 2024 BUDGET:** $169,000 |