

Your Company's Name



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Mobile Bar Business Plan

Prepared By

Your Name

Your Contact Information

Date



Executive Summary

Summarize your entire business plan once you complete it. Include a description of your business, its products or services, management team, target market, competition, marketing and sales strategies, financial projections, and funding needs.



Company Description

An overview of your business.

Product/Service:

A high-level overview of your product/service. Keep it simple, as you'll have the opportunity to go into more detail on this later on. You should also note how your mobile bar will provide these products and services. Will you only provide the bar (no beverages or service), will you work with a partner who is able to serve liquor, or will you provide a full-service experience? You can find more information about this in the Products and Services section.

Leadership Team:

Include First Name and Last Name, followed by Title, Roles, and Responsibilities of each party.

Expertise:

Include any relevant expertise held by members of the Leadership Team that you would want investors to know. The goal here is establishing credibility and building value. For example, if someone in your team has 20 years of experience in Marketing, that could assist in demonstrating the feasibility of your marketing plans, and mean less initial investment into marketing efforts.



Company Description

Legal/Organizational Structure (Sole Proprietor, LLC, etc.):

List the legal/organizational structure of your business (Sole Proprietor, LLC, S Corporation, etc.)

Business Model (B2B, B2C):

The framework for how your business will operate profitably and provide value to customers. The most common business models for Mobile Bars are Business-to-Consumer (B2C) and Business-to-Business (B2B).

Location:

Include not only where your business is based, but also the area where your business will operate. If you are planning to operate in multiple states, you might need to meet different legal requirements or hold different licenses/permits to comply with each state's laws.

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Company Description

Mission Statement:

What your business does.

Vision Statement:

What you want your business to become.

Growth Plan Overview:

A summary of your growth plan.

Problems Your Company Solves:

How does your business add value for its customers? Why would someone want to work with you or purchase your products/services?

Summary of Competitive Advantages:

Is your business offering a new product? Is it the first in your market? Is your price-point lower?



Market Analysis

Industry:

What industry is your business (events, food & beverage, etc.)?

Market:

Where will your business operate? How far are you willing to travel? What segments will you focus on (weddings, corporate events, etc.)?

Overview of Competitive Landscape:

Consider reviewing our [Mobile Bar Industry Report](#). In the next section, you'll conduct market research that will help you gain more insight on your business's competitive landscape. Come back to this section once you've selected key competitors and completed your SWOT Analysis.

Problems We Solve:

What specific competitive advantages do you offer that will appeal to your target customer's frustrations and motivations?

Summary of Competitive Advantages:

Summarize what sets your business apart from your competitors and why a potential client would choose your business over another.



Competition:

List 5-10 competitors. Include Direct, Indirect, and Tertiary Competitors (defined below).

Direct competitors: Sell/provide the same product/service In the same market.

Indirect competitors: Sell/provide the same product/service in a different market.

Tertiary competitors: Sell/provide a similar service in a similar market but do not compete directly.

Competitor #1		Competitor #2	
Location / Market		Location / Market	
Target Market / Customer		Target Market / Customer	
Business Size		Business Size	
Business Model		Business Model	
Services		Services	
Pricing		Pricing	
Strategies		Strategies	
Strengths		Strengths	
Weaknesses		Weaknesses	
Social Media Following		Social Media Following	
How To Win		How To Win	
Why Choose Us		Why Choose Us	

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Competition:

Competitor #3		Competitor #4	
Location / Market		Location / Market	
Target Market / Customer		Target Market / Customer	
Business Size		Business Size	
Business Model		Business Model	
Services		Services	
Pricing		Pricing	
Strategies		Strategies	
Strengths		Strengths	
Weaknesses		Weaknesses	
Social Media Following		Social Media Following	
How To Win		How To Win	
Why Choose Us		Why Choose Us	

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Competition:

Competitor #5		Competitor #6	
Location / Market		Location / Market	
Target Market / Customer		Target Market / Customer	
Business Size		Business Size	
Business Model		Business Model	
Services		Services	
Pricing		Pricing	
Strategies		Strategies	
Strengths		Strengths	
Weaknesses		Weaknesses	
Social Media Following		Social Media Following	
How To Win		How To Win	
Why Choose Us		Why Choose Us	

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Competition:

Competitor #7		Competitor #8	
Location / Market		Location / Market	
Target Market / Customer		Target Market / Customer	
Business Size		Business Size	
Business Model		Business Model	
Services		Services	
Pricing		Pricing	
Strategies		Strategies	
Strengths		Strengths	
Weaknesses		Weaknesses	
Social Media Following		Social Media Following	
How To Win		How To Win	
Why Choose Us		Why Choose Us	

**SWOT Analysis:**

A SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis of your business can be a valuable tool to develop your sales and marketing strategy. The tougher you are on yourself in your SWOT Analysis, the easier it will be to plan for and solve problems. Are your strengths really strengths? How can you be even stronger? Is another business already filling the opportunities you've identified? What are your weakest points? Can you overcome them with the right planning? What are the biggest threats to your business?

	Positive	Negative
Internal	Strengths	Weaknesses
External	Opportunities	Threats



Target Customer

Create a persona of your target customer to establish the foundation for your marketing plan. Keep in mind what you learned in your competitive analysis.

Customer Persona

Demographics	Age	
	Location	
	Family Status	
	Education	
	Income	
Background	Bio / Description	
	Frustrations	
	Motivations	
Interests / Communication	Interests	
	Brands	
	Personalities	
	Channels	
	Content Types	



Products and Services:

Products and Services Include:

List all the products and services your business will sell.

Pricing Structure:

List the cost of each product or service. Pricing structures will vary depending on how you plan to operate your business. For example: you might sell all-inclusive packages, charge by the hour, and/or charge per person.

Business Model:

The framework for how your business will sell its products and services. Mobile bars typically operate in 1 of 3 ways: Dry Hire, Licensed Partners, or Full-Service.

Dry-Hire: You provide the bar, and the customer provides the service and drinks.

Licensed Partners: You partner with another business that is licensed to sell and serve alcohol.

Full-Service: You have your own liquor license and provide a full-service experience.

You can read more about these business models in our blog titled: [Do You Need a Liquor License to Start a Mobile Bar Business?](#)



Marketing Plan:

Growth Strategy:

*Keep your target customer persona in mind. How will you reach more people like your target customer?
How will you grow your business? Will you add more products or services?*

Communicating With The Target Customer:

*Keep your target customer persona in mind. How will you communicate with your target customer?
What specific competitive advantages do you offer that will appeal to their frustrations and motivations?*

Sales Plan:

*How will your business generate revenue? How will you make sales? What strategies will you use to
close a sale once you reach your target customer through your marketing efforts?*

Measuring Success:

*What Key Performance Indicators (KPIs) can you measure to ensure your business is on the right
track? For example: Number of Bookings, Number of Leads or Phone Calls, etc.*



Logistics and Operations

List workflows/processes needed to operate the business. Consider how you'll manage bookings, how you'll get paid, and how you'll transport your mobile bar. If you plan on serving beverages, how will you create menus and how will you prepare drinks to serve in bulk at events? You don't need to go into too much detail, but planning for these processes will help streamline the operation of your business.



Funding Request

Provide investors with a clear outline of the funding required for the first 5 years of operation. State whether you want to take on debt or give up equity in your business in exchange for funding. List any terms to be applied. Give a detailed description of what the funds will be used for (for example: buying equipment or supplies, hiring staff, etc.). Include future financial plans like paying off debt or selling the business.



Financial Plan

Income Statement

An income statement shows a company's revenue, expenses, and net income or loss over a specific period of time, such as a quarter or year. You will only need to complete an income statement if your business has already been operating for some time. If your business is new, continue to the Financial Projections section.

Income Statement

Revenue

Sales	
Total:	

Expenses

Staff	
Supplies	
Transportation	
Marketing	
Other	
Total:	

Other Income and Expenses

Interest	
Income Tax	
Gains on Sale of Equipment	
Total:	



Balance Sheet

A balance sheet shows a company's assets, liabilities, and equity at a specific point in time, such as the end of a quarter or year. You will only need to complete a balance statement if your business has already been operating for some time. If your business is new, continue to the Financial Projections section.

Assets

Current Assets

Cash and Cash Equivalents	
Accounts Receivable (events booked, but not yet paid)	
Inventory	
Other	
Total:	

Fixed Assets

Equipment (Mobile Bar)	
Less Depreciation	
Other	
Total:	

Liabilities and Shareholder Equity

Liabilities

Debt	
Accounts Payable (expenses not yet paid)	
Taxes Payable	
Other	
Total:	

Shareholder Equity

Common stock	
Retained Earnings	
Other	
Total:	



Cash-Flow Statement

A cash-flow statement shows the inflows and outflows of cash in a company over a specific period of time, such as a quarter or year. It helps to track how much cash is available to cover expenses, pay off debt, and reinvest in the business. You will only need to complete a cash-flow statement if your business has already been operating for some time. If your business is new, continue to the Financial Projections section.

Cash-Flow Statement

Operating Activities

Net Income	
Depreciation / Amortization	
Changes in Working Capital (Payroll, Accounts Payable / Receivable, etc.)	
Total:	

Investing Activities

Purchase or Sale of Property / Equipment	
Purchase or Sale of Investments	
Other	
Total:	

Financing Activities

Issuance of Debt	
Repayment of Debt	
Dividends and Distributions	
Total:	

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Debt Pay-Off Plan

Outlines a strategy to repay outstanding debts or debts you plan to incur. Include a detailed schedule of debt payments along with projections of future cash-flow and income.

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Financial Projections

Make projections about future income and cash-flow based on your research, industry benchmarks, and assumptions about future revenue and expenses. Include information on startup costs, projected revenue / expenses, and cash-flow projections for at least the first year of operation. This can help you estimate how much funding you'll need to launch your business and sustain operations until you start generating revenue.

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Appendix

Add any additional materials requested by investors. For example: Credit Histories, Resumes, Photos/Renderings, Letters of Reference, Licenses, Permits, Legal Documents, Contracts, etc.