



AERO BUILD

MOBILE BUSINESS PLAN 2023



Getting Started

A mobile business plan provides you with the opportunity to organize your vision and ensure that nothing is overlooked when opening a business for the first time, reworking your concept, or opening a new concept. When you're tangled in the weeds of licensing, staffing, and other operational stressors, the plan will act as a roadmap to help you stay focused.

Instructions for Your Business Plan Template

Start with the cover page. Insert your company logo as well as your name, address, phone number, and email address.

Then, continue to the business plan itself. As you're filling out each chapter in this business plan template, there are prompts and directions *in italics below each section header*. Your writing starts in the regular text below the prompts. Simply delete "Start..." and begin writing. Each mobile concept is different, which is why we chose to give you space to explain your individual concept in detail. There are also a few interactive "fill-in-the-blank" parts of this template, such as the management headshots and the competitive matrix.

Finally, when you're ready to show your business plan to the world, simply delete everything in italics, as well as the first page and the last page. Your business plan will start with the cover page and end with your financial analysis. To print, click File > Print and to download, click File > Download As and choose your preferred format.

Ready? Let's get started!



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Executive Summary

The executive summary is the first section included in any business plan. It acts as both the introduction to, and the summary of, your entire idea. This section should introduce the key elements of what will be discussed throughout the business plan. It should present a complete and concise summary that is designed to catch the reader's attention and entice them to explore the rest of the plan. An executive summary includes things like the mission statement, proposed concept, how you will execute on the plan, overview of potential costs, and the anticipated return on the investment. Potential investors will look here first to see your plan for a successful future - so make sure it's good!

Start...

Company Overview

In this section, begin to explain the high-level elements of the proposed business. The company overview introduces information about the ownership structure, location, and business concept. Outline the vision for the guest experience. Describe the brand. Identify the service model, design, layout, general theme, and unique aspects of the overall concept.

Mobile Business Concept

In this section, give an overview of your restaurant concept. What is the defining theme? Is it casual or formal? Describe your brand, what you're offering, and how you're differentiated from the competition. What kind of food are you offering? What is the price point? This section doesn't need to go into specifics – you'll talk about your menu, finances, and specific models further down – so keep this high-level.

Start...

Sample Menu

Share a sample menu to be used at your restaurant, including separate menus for breakfast, lunch, dinner, and drinks. Outline your strategy for menu costing, menu engineering, and menu design, including how you will test your menu over time to improve profits. [Take the Menu Engineering Course](#) for more tips and to learn more.

Start...

Management Team

Share the names of the people on your executive team, as well as their shared and individual responsibilities. Examples: CEO, COO, Managing Partner, General Manager, Kitchen Manager, Chef, Director of IT, etc.

Start...

Industry Analysis

Describe the existing conditions in the general market and in the specific location or area that you plan to operate. This section could cover things like the growth of the local economy and industry, infrastructure projects, nearby business and residential areas, average traffic counts in the area, and private events you can book. This section could also include your unique positioning – showcasing your ability to adapt and thrive in a sometimes-oversaturated marketplace.

Target Market

The service industry is an extremely competitive landscape, so finding a strategic niche is imperative. You should have a strong idea of who your business will attract and who will become your repeat customers. Describe the target market and how it compares to the standard, immobile businesses in the industry as a whole in terms of diner demographics, characteristics, and behaviors.

Start...

Market Positioning

What products are you selling – beyond your day-to-day menu? You want to show that you're offering something unique that other concepts might not have. Talk about any unique products, innovations that showcase your adaptability, or anything interesting that sets you apart from the competition.

Start...

Location Analysis

Focus on the general area or city you plan to locate the new business and why you chose that specific area. Note things like growth of the local economy, large citywide events, private

events, and infrastructure projects nearby. Compare the existing market conditions to your intended target market. Potential investors will look at this section of the business plan carefully to make sure that the market in the proposed location aligns with the ideal customer profile.

Start...

Competitive Analysis

What other businesses are in the proposed area? This section should explain the existing competitive landscape: the number of other similar businesses in the area, paying particular attention to those with similar concepts. Investors will want to understand the specific aspects of your concept that will give you a competitive advantage.

Start...

Marketing Plan

The marketing plan explains your marketing strategy and the tactics you will rely on before and after the business is operational. Perhaps you will rely more on public relations and advertising before the restaurant opens and focus on things like social media, loyalty programs, building a customer database, booking future events and running ads once the business is operational.

Customer Database

Whether you're contacting members of your loyalty program or completely new customers, email marketing is an incredibly efficient way to stay top of mind. Gathering email addresses is the first step.

In this section, explain your email marketing strategy. How will you collect customer email addresses and learn about their behaviors at your business and services, such as average guest list size? Once you grow an existing customer database, what is your plan to engage your clients to book again? What kind of campaigns do you plan to run?

Start...

Loyalty Program

If you are planning on posting in a permanent spot or serve the same area, loyalty programs have been proven to be beneficial in encouraging repeat customers.

In this section, explain how you'll create a loyalty program that's easy to join and will give guests an immediate incentive. Does your Point of Sale offer a loyalty program? Will guests be able to

track their rewards or points on their phone? Will they be using a loyalty card, or will their credit card be tied to their rewards account? What kinds of rewards will you offer guests?

Start...

Public Relations

In order to penetrate your target market, you will need to get in front of the right people: your would-be customers. Highlight your PR strategy in your business plan, including resources you may send to newspapers and other publications, such as a one-page press release about your mobile business opening or a manifesto of your brand. Create a goal for exposure in your local market as well as on a national scale.

Start...

Advertising and Social Media

Today, social media is an inevitable part of running a business. Your guests are on social media, so you should be, too. And with some promotion, you can be sure that your guests will be sharing on TikTok, posting on Instagram, and posting Google reviews in no time. Share your plan for social networks as well as review sites, including how you'll build a digital community and how you'll advertise on these platforms in the future.

Start...

Operations Plan

Here you should paint a picture of how the mobile business will operate day-to-day once it is operational. Include in this section:

Staffing and Training

Which staff positions will you need and how many people do you expect in each of the different roles? What is the approximate pay for each position? How do you plan to recruit staff and what are the hiring criteria for each role? And, once you hire your staff, what's your plan for team management? Think about how you're going to handle scheduling, payroll, labor reporting, and performance insights.

Start...

Work Health and Safety Standards

Cleanliness is more important to restaurant operations than ever before. By putting the right food and beverage safety systems and precautions in place, you'll keep your team and guests

safe. In this section, outline your cleaning procedures, food safety, and health standards. Every state and country has different rules regarding inspections and health code violations. Learn more about your specific regulations [here](#) and recommended safety measures from the WHO [here](#).

Start...

Customer Service Policies and Procedures

How do you expect to provide a favorable and consistent guest experience? What are the specific service values, policies, and procedures you will put in place, and how will they be enforced or encouraged?

Start...

Suppliers

How will you track sales and inventory, manage labor, and control cash? How will you process credit cards, and which restaurant tools will you use? From which vendors will you buy your coffee beans, spirits, or food?

Start...

Financial Analysis and Growth Plan

The financial analysis is often one of the final portions of a business plan. Investors expect to see a breakdown of how you plan to spend their investment in the first year and a comparison of the anticipated costs and projected revenue. There are a few major elements you should be sure to include in this section.

Investment Plan

Here you explain the initial investment you are hoping to receive and how you plan to spend that investment during the first year. This will usually include kitchen equipment, general supplies, furniture, payroll, legal fees, marketing, and some working capital.

Start...

Projected P&L Statement

The business plan is created long before the restaurant actually opens, so creating this profit and loss statement will require you to make a number of assumptions. You can make educated

guesses about the various costs and sales elements included in a P&L, your target market, and the existing market in the area you've selected for your restaurant.

Start...

Break-Even Analysis

This one is pretty straightforward. Investors will want to know how much revenue you will need to bring in each month in order to break even once all of the various overhead and operational costs are factored into the equation. There are always going to be some variable costs, so make a note of what you expect that to be in your analysis.

Start...

Expected Cash Flow

Your cash flow will depend on how often you expect to purchase inventory, the size of your staff and payroll, and the payroll schedule. Once your mobile business is operational, some months will be better than others. The cash flow analysis should help investors understand that, based on your expectations, your business will be able to support itself even in the less fruitful months without requiring additional investments.

Start...