





## **Table of Contents**

|  |  |
| --- | --- |
| **1. EXECUTIVE SUMMARY** | Page Number |
| **2. GETTING TO KNOW THE COMPANY** | Page Number |
| 1. Brief Company History | Page Number |
| 1. Business Profile | Page Number |
| 1. Mission Statement | Page Number |
| 1. Goals | Page Number |
| 1. Management Profile and Summary | Page Number |
| 1. Types of Services Provided | Page Number |
| 1. Legal Ownership | Page Number |
| 1. Business Process and Procedures | Page Number |
| **3. MARKET PROFILE AND SUMMARY** | Page Number |
| 1. Market segmentation | Page Number |
| 1. Targets and Clients | Page Number |
| 1. Sales Strategies | Page Number |
| 1. Risk assessment and management | Page Number |
| 1. S.W.O.T. analysis | Page Number |
| 1. Advertising Strategies | Page Number |
| **4. FUTURE PLANS** | Page Number |
| **5. FINANCIAL PROFILE AND DYNAMICS** | Page Number |
| Financial Objectives | Page Number |
| Financial Projections and Forecast | Page Number |
| Balance Sheet | Page Number |
| Profit and Loss | Page Number |
| Cash Flow | Page Number |
| **6. OTHER RELEVANT MATERIALS AND DOCUMENTS** | Page Number |

1. **EXECUTIVE SUMMARY**

[SPECIFY YOUR BUSINESS NAME] is a large-scale trucking business company that aims to be included in the list of award-winning and highly-recommended companies that provide trucking services in [SPECIFY AREA OR STATE]. The business is founded upon the principles of dynamism and flexibility. In the advent of globalization and increasing advancements in information technology and other devices, the company aims to expand to other industries rather than focusing on the delivery of goods.

The company provides high quality, equitable, and stellar services to its clients without any delays and unreasonable excuses. It puts much value on the trust and confidence given by its clients and ensures that the transported goods and materials in whatever form are delivered without any damage with regard to its condition. Its management philosophy is based on the principles of accountability and transparency. The staff and employees are given the opportunity to raise their concerns while the management listens to them in order for them to come up with a compromise not just for the benefit of the parties involved but the business as a whole. This type of ethical practice is also observed by the employees in the course of interacting and dealing with [SPECIFY YOUR BUSINESS NAME] clients and customers.

For now, [SPECIFY YOUR BUSINESS NAME] specializes on the field of [SPECIFY SPECIFIC TYPE OF SERVICES OFFERED]. However, this plan will embody its prospective plans for expansion considering the results of its market research, analysis, and extensive assessment.

Furthermore, the plan will also embody the financial dynamics of the business, its approaches to risks and issues of sustainability, and how it will increase its level of appeal to its target market by coming up with marketing strategies and strategic activities.

1. **GETTING TO KNOW THE COMPANY**

In the course of making a suitable plan for the company, the management considered the holistic nature and dynamics of [SPECIFY BUSINESS NAME]. It takes into account the historical background of the company, its geographical positioning, the ethical goals and thrust of the company, the legal considerations, and other modes of procedure that are relevant to its conduct. These factors shape the identity of the company which must be evident all throughout the planning process. The company must not deviate from its agreed mandate just for the sake of reaping profits to the expense of other dominant considerations such as its employees’ welfare, environmental issues, and many more.

### **Brief Company History**

[SPECIFY BUSINESS NAME] is characterized by an interesting and colorful history. The owners, [SPECIFY OWNER(s) NAME], did not really intend to establish a large scale company because originally their purpose was to use said business as their means of subsistence. Fortunately, the business grew and until now, it continues to dominate the provision for trucking services in [SPECIFY AREA OR STATE].

Historically, [SPECIFY YOUR BUSINESS NAME] was founded in [SPECIFY DATE OF COMMENCEMENT OF BUSINESS]. It started to conduct its operations in [SPECIFY ORIGINAL PLACE OF DOING BUSINESS]. During this time, the operations and services of the company was directed by the owners themselves and their 10 drivers and 10 tractors and trailers. Even if the company only managed 20 employees, it consistently emphasized to its employees the importance of working together, giving each other the respect they deserve, and being accountable for their actions and decisions. They were constantly reminded that what they do during the course of business operations affect the company whether or not the results are favorable or unfavorable to the latter. Below is a brief timeline that represents the significant historical events concerning [SPECIFY YOUR BUSINESS NAME].

[INSERT A BRIEF HISTORICAL TIMELINE]

Moving forward, the company continuous to grow and accept new members to its family. From a company with 20 employees, [SPECIFY YOUR BUSINESS NAME] is now dealing with approximately [SPECIFY NUMBER OF EMPLOYEES] and counting. Because of its values, customers and clients are consistently giving high ratings and also share the experience to their families and friends.

1. **Business Profile**

[SPECIFY YOUR BUSINESS NAME] is a well-established trucking company that provides several services such as freight transport, delivery of goods, and [SPECIFY TRUCKING SERVICES]. The following matrix provides its updated business details:

|  |  |
| --- | --- |
| **Legal and Registered Trading Name** | [SPECIFY BUSINESS NAME] |
| **Areas of Specialization** | [SPECIFY THE NATURE OF THE SERVICES OFFERED] |
| **Principal Place of Business** | [SPECIFY ADDRESS] |
| **License and Permit Number** | [SPECIFY DETAILS] |
| **Contact Numbers** | [SPECIFY CONTACT DETAILS] |
| **Fax Number** | [SPECIFY FAX NUMBER] |
| **Email Address** | [SPECIFY EMAIL ADDRESS] |
| **Business hours and working days** | [SPECIFY BUSINESS HOURS/DAYS] |
| **Accreditations** | [SPECIFY ACCREDITATIONS] |
| **Partners and Organizations** | [SPECIFY NAMES OF ORGANIZATIONS SUCH COMPANY IS A MEMBER OF] |

1. **Mission Statement**

**Mission**

[SPECIFY YOUR BUSINESS NAME] aims to provide its customers and clients the highest level of transportation services in the most secure and efficient manner. It is a company that does not believe and deal with the impossible, instead it finds ways and means to deliver the best type of service that its clients deserve to experience.

At the core of our brand statement is our priority to instill professional and effect customer service operations. It also adopts a competitive price system that is reasonable and fair. The price is not an issue because our customers will experience a type of service that is worth every dollar that they are willing to spend.

[SPECIFY YOUR BUSINESS NAME] mission is to be of the top providers of trucking services in [SPECIFY AREA OR STATE]. It is a success-driven business that appreciates and welcomes change and sustainable development.

**Vision**

[SPECIFY YOUR BUSINESS NAME] is a trucking company that considers the importance of balancing out economic and social development. It is a company that advocates environmental sustainability and security and always consider these values in the course of exercising their duties and obligations. Furthermore, its risk management plan is high-end to ensure that they will top the list of trucking companies in terms of safety, security, professionalism, and quality.

1. **Goals**

Over the years, [SPECIFY BUSINESS NAME] has been serving approximately [SPECIFY NUMBER OF CUSTOMERS]. Recently, the Chief Executive Officer [SPECIFY CEO] demanded for the revisiting and revising of company’s goals and objectives for the year [SPECIFY YEAR(S)]. In line with this, the following objectives were agreed and spelled out by the members of the planning committee.

* To provide quality services through timely deliveries, professional and courteous employees and many more;
* To use competitive rates but still considering the financial capacities of its target customers and clients;
* To increase our company’s level of reliability and credibility in securing the quality and good condition of the products during, and after delivery.
* [SPECIFY OBJECTIVES]

1. **Management Profile and Summary**

[SPECIFY YOUR BUSINESS NAME] adopts a systematic management system that is merit-based and skill-oriented. The company ensures that the people working behind it have necessary skills and licenses required for them to diligently perform their tasks. To date, the company is made of [SPECIFY NUMBER OF EMPLOYEES]

The tables below embody the list the overall company profile from the managers up to the personnel.

|  |  |  |  |
| --- | --- | --- | --- |
| **Management Profile** | | | |
| List of Managers | Relevant Credentials | Department | Salary |
| [SPECIFY] | [SPECIFY] | [SPECIFY] | $xxxxxxx |
| [SPECIFY] | [SPECIFY] | [SPECIFY] | [SPECIFY] |

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Personnel** | | | |
| **List of Personnel (Truck drivers and Administrative Officers)** | **Relevant Credentials** | **Department** | **Salary** |
| [SPECIFY] | [SPECIFY] | [SPECIFY] | $xxxxxxx |
| [SPECIFY] | [SPECIFY] | [SPECIFY] | [SPECIFY] |

1. **Services**

[SPECIFY YOUR BUSINESS NAME] provides several trucking services both for passenger transport and delivery of goods and cargoes. To be more specific, the table below emphasizes the list of services offered by this company.

|  |  |  |
| --- | --- | --- |
| **IST OF SERVICES** | | |
| **TYPE OF SERVICE** | **SERVICE DESCRIPTION** | **Price Range** |
| [SPECIFY TYPE OF SERVICE, is it for goods, passengers, cargoes?] | [PROVIDE A SHORT DESCRIPTION ABOUT THE SERVICE INCLUDING THE EXCLUSIONS AND INCLUSIONS OF THE PACKAGE] | [SPECIFY AMOUNT] |
| [SPECIFY TYPE OF SERVICE, is it for goods, passengers, cargoes?] | [PROVIDE A SHORT DESCRIPTION ABOUT THE SERVICE INCLUDING THE EXCLUSIONS AND INCLUSIONS OF THE PACKAGE] | [SPECIFY AMOUNT] |
| [SPECIFY TYPE OF SERVICE, is it for goods, passengers, cargoes?] | [PROVIDE A SHORT DESCRIPTION ABOUT THE SERVICE INCLUDING THE EXCLUSIONS AND INCLUSIONS OF THE PACKAGE] | [SPECIFY AMOUNT]  [SPECIFY AMOUNT] |

**LEGAL OWNERSHIP**

[SPECIFY YOUR BUSINESS NAME] is a [SPECIFY TYPE OF BUSINESS STRUCTURE (ex. Sole proprietorship, partnership, corporation, and many more)]. It is doing business in [SPECIFY PLACE AND AREA]. It has complied with the needed permits, licenses, and legal procedures sanctioned under the law of [SPECIFY COUNTRY].

**BUSINESS PROCESSES AND PROCEDURES**

To ensure that the services rendered are properly executed by the designated employees of the company, there are certain standard protocols and procedures followed by this company. The table below creates a summary of the systems, protocols, and procedures that are being established and at the same time updated annually.

|  |  |  |
| --- | --- | --- |
| **List of Procedures/ Business Processes** | **Designated Department** | **Brief Description** |
| [SPECIFY PROCEDURE] | [SPECIFY DEPARTMENT Ex. Operation, Finance, Procurement, Admin, Research, Marketing] | [SPECIFY RELEVANT DETAILS] |
| [SPECIFY PROCEDURE] | [SPECIFY DEPARTMENT Ex. Operation, Finance, Procurement, Admin, Research, Marketing] | [SPECIFY RELEVANT DETAILS] |

## 

## **MARKET PROFILE AND SUMMARY**

## [SPECIFY YOUR BUSINESS NAME] has been increasingly investing on its marketing programs, plans, initiatives, and research-related undertakings. Given the nature and dynamics of the tracking business, understanding the fluctuations and trends prevailing in the market is a must.

1. **Market Segmentation**

In terms of customer segments, the business caters to several types of customers such as those in the retail industry, computer, textile, food, and many more [SPECIFY TYPE OF INDUSTRIES THAT YOU CATER AND PROVIDE YOUR SERVICES]. The provided pie chart below embodies the market segmentation applicable to the trucking business in [SPECIFY AREA OR STATE].

[SPECIFY PIE CHART WITH THE CUSTOMER SEGMENTATION]

[SPECIFY YOUR MARKET ANALYSIS BASING FROM THE PROVIDED CUSTOMER SEGMENTATION]

1. **Targets and Clients**

In line with the findings pertaining to the prevailing customer segmentation, [SPECIFY YOUR BUSINESS NAME] plans to cover and put more emphasis in the selected sectors such as [SPECIFY TARGET MARKETS] because it will boost the company’s reputation and will bring about more recommendations.

|  |  |  |
| --- | --- | --- |
| **Type of Industry** | **Target Clients** | **Services to be Provided** |
| [SPECIFY INDUSTRY] | [SPECIFY CLIENT DETAILS] | [SPECIFY SERVICE] |
| [SPECIFY INDUSTRY] | [SPECIFY CLIENT DETAILS] | [SPECIFY SERVICE] |

1. **Sale Strategies**

In terms of sale strategies, [SPECIFY YOUR BUSINESS NAME] adopts to the prevailing sales strategies that are now implemented in most businesses that is creating a strong online presence. The table below will embody the sales plan of the company emphasizing the list of planned activities, the indicators adopted, the objectives, the budget required and date of implementation and completion.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SALES STRATEGIES** | | | | |
| **List of Sales Strategy** | **Indicators** | **Objectives** | **Budget** | **Date of Completion and Implementation** |
| [SPECIFY SALES PROGRAM OR PROJECT] | [SPECIFY INDICATORS] | [SPECIFY OBJECTIVES] | $xxxxxx.xxx | [SPECIFY DATE] |
| [SPECIFY SALES PROGRAM OR PROJECT] | [SPECIFY INDICATORS] | [SPECIFY OBJECTIVES] | $xxxxxx.xxx | [SPECIFY DATE] |

1. **Risk Assessment and Management**

In the course of conducting its business operations, the managers and owners of the business recognize the reality that risks are evident in all business transactions. In line with this, they came up with a plan concerning the procedures on how they will identify, assess, and manage such risks. In line with this, the following are the chosen procedures pertaining to risk assessment and management:

[SPECIFY RISK ASSESSMENT PROCEDURES AND PROCESSES]

[SPECIFY RISK MANAGEMENT PROCEDURES AND PROCESSES]

1. **S.W.O.T Analysis**

This type of analysis is used in order to foreground the company’s strengths, weaknesses, opportunities, and threats. These particular information must be a known to the company for the management to come up with initiatives and solutions to resolve such. An extensive assessment can help develop and improve the overall operations of the company.

**1. STRENGTHS**

[SPECIFY YOUR BUSINESS STRENGTHS]

**2. WEAKNESSES**

[SPECIFY YOUR BUSINESS WEAKNESSES]

**3. OPPORTUNITIES**

[SPECIFY YOUR BUSINESS OPPORTUNITIES]

**4. THREATS**

[SPECIFY THREATS TO YOUR BUSINESS]

1. **Advertising Strategies**

Because of the increasing number of competitors that the [SPECIFY YOUR BUSINESS NAME] is currently facing, there is a dire need for a systematic, appealing, and engaging advertising and marketing strategies. Taking into account the nature of the trucking business, there are diversified players and commercial carriers prevalent in [SPECIFY AREA OR STATE] nowadays. The table below emphasizes the list of strategies that [SPECIFY BUSINESS NAME] will implement with the corresponding objectives, the budget allocation, the date of implementation, and person(s) responsible.

|  |  |  |  |
| --- | --- | --- | --- |
| **ADVERTISING STRATEGIES** | | | |
| **Advertising Activities and Programs** | **Objectives** | **Budget** | **Date of Completion** |
| [SPECIFY ADVERTISING PROGRAMS ex. Television and Online advertising] | [SPECIFY GOALS] | $xxxxxx.xxx | [SPECIFY DESIGNATED DATE OF COMPLETION] |
| [SPECIFY ADVERTISING PROGRAMS] | [SPECIFY GOALS] | $xxxxxx.xxx | [SPECIFY DESIGNATED DATE OF COMPLETION] |

1. **FUTURE PLANS**

Strategically, [SPECIFY YOUR BUSINESS NAME] aims to promptly deliver and execute its plans with respect to the agreed timeline. The plan provided below embodies the prospective plans and thrust of the business categorized as “milestones”.

|  |  |  |
| --- | --- | --- |
| **FUTURE PLANS** | | |
| **Milestones** | **TIMELINE** | **DELEGATED TO:**  [SPECIFY PERSON(s)to spearhead the planning and execution of the plan] |
| **[SPECIFY MILESTONE]** | [SPECIFY START DATE AND END DATE] | [SPECIFY MANAGER ] |
| **[SPECIFY MILESTONE]** | [SPECIFY START DATE AND END DATE] | [SPECIFY MANAGER ] |
| **[SPECIFY MILESTONE]** | [SPECIFY START DATE AND END DATE] | [SPECIFY MANAGER ] |

## **FINANCIAL PROFILE AND DYNAMICS**

The owners and management of [SPECIFY YOUR BUSINESS NAME] consider the significance planning out a comprehensive and holistic financial plan that will coincide with the strategies and objectives of the business. At the end of the day, the business needs a certain amount of revenue for it to remain liquid and at the same time surpass its competitors by making expansions and implementing business strategies. For this plan, the coverage will be as follows:

1. Financial Objectives
2. Financial Projections and Forecast
3. Balance Sheet
4. Profit and Loss
5. Cash Flow
6. **Financial Objectives**

Because of the diversified services offered and provided by [SPECIFY BUSINESS NAME], it modified and revised its set of objectives and goals with respect to its finance such as the following:

|  |
| --- |
| **FINANCIAL OBJECTIVES AND GOALS** |
| [SPECIFY YOUR OBJECTIVES] |
| [SPECIFY YOUR OBJECTIVES] |
| [SPECIFY YOUR OBJECTIVES] |

The company also takes into account that the financial department may suggest additional changes as they deem necessary and a revised financial plan will be printed and disseminated after securing the management’s approval.

1. **Financial Projections and Forecast**

The table provided below represents the general financial assumptions for the year(s) [SPECIFY YEAR(s)].

|  |  |  |  |
| --- | --- | --- | --- |
| **GENERAL ASSUMPTIONS** | | | |
|  | **YEAR [SPECIFY]** | **YEAR [SPECIFY]** | **YEAR [SPECIFY]** |
| Current Interest Rate | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] |
| Long-term Interest Rate | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] |
| Plan Month | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] |
| Tax Rate | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] | [SPECIFY PERCENTAGE] |
| Other Assumptions | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |

1. **Balance Sheet**

The provided balance sheet below observes a pro-forma outline. It provides a detailed projections as to possible changes in the company’s balance sheet for the year(s) [SPECIFY YEAR(s)].

|  |  |  |  |
| --- | --- | --- | --- |
| **BALANCE SHEET PROJECTION** | | | |
|  | **[SPECIFY YEAR]** | **[SPECIFY YEAR]** | **[SPECIFY YEAR]** |
| Assets | | | |
| Current Assets | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Fixed Assets | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Cash | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Other types of Assets | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Total Assets | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Short Term Liabilities | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Long Term Liabilities | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Total Liabilities | **[SPECIFY VALUE] $xxxxxxx.xxxx** | | |
| Total Capital: | **[SPECIFY VALUE] $xxxxxxx.xxxx** | | |
| **Net Worth : [SPECIFY VALUE] $xxxxxxx.xxxx** | | | |

1. **Profit and Loss**

The table below provides a financial forecast and projection as to the yearly profit and loss of the [SPECIFY YOUR BUSINESS NAME] for the year(s) [SPECIFY YEAR(s)]. Moreover, there is also a provided chart for clarification and further references.

|  |  |  |  |
| --- | --- | --- | --- |
| **PROFIT AND LOSS PROJECTIONS** | | | |
|  | [SPECIFY YEAR] | [SPECIFY YEAR] | [SPECIFY YEAR] |
| SALES  [SPECIFY TYPES OF SALES] | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| GROSS PROFIT  [SPECIFY ITEMIZED BREAKDOWN] | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| TOTAL OPERATING EXPENSES  [SPECIFY ITEMIZED BREAKDOWN] | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| **NET PROFIT/SALES** | **[SPECIFY VALUE] $xxxxxxx.xxx** | | |

1. **Cash Flow**

The table below represents the general assumptions and projections pertaining to the cash flow dynamics of the business for the year(s) [SPECIFY YEAR(s)].

|  |  |  |  |
| --- | --- | --- | --- |
| **CASH FLOW PROJECTIONS** | | | |
|  | **YEAR [SPECIFY YEAR]** | **YEAR [SPECIFY YEAR]** | **YEAR [SPECIFY YEAR]** |
| Total Cash Sales | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Total Cash from Operations | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |
| Total Cash Received | [SPECIFY VALUE] | [SPECIFY VALUE] | [SPECIFY VALUE] |

1. **OTHER RELEVANT MATERIALS AND DOCUMENTS**

Other than the provided documents, materials, and citations, there are also attached documents and relevant materials that were used by the company as benchmarks and guides in the course of creating this extensive trucking business plan. These documents can be categorized as follows:

[SPECIFY OTHER REFERENCES AND ATTACHMENTS]