

# Packing service Startup: A Real-World Sample Business Plan

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SecurePak Solutions LLC (Texas LLC, founded March 15, 2024) provides certified eco-friendly packing services to residential movers and e-commerce businesses in Central Texas at \$1,200-\$3,500 per residential job and \$3.50-\$7.00 per e-commerce order. We target \$420,000 Year 1 revenue with 58% gross margin. Founders Jordan Thompson (ex-Two Men and a Truck operations manager, scaled to \$8.2M revenue) and Maria Delgado (CRP, managed 12-person packing team).

## SECTION 1: EXECUTIVE SUMMARY

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68% of Americans hire packing help during moves (U.S. Moving & Storage Association, 2023), yet 34% of logistics support roles remain vacant (BLS), causing \$1.8B in annual damage claims from DIY packing errors. SecurePak solves this with certified technicians using eco-materials at flat rates: \$1,200 for 1-bedroom homes (65% of residential jobs), \$3.50/order for e-commerce. We capture 0.1% of Central Texas' \$18.5M packing segment in Year 1 through 18.3 jobs/month average.

Revenue model: 70% residential (avg. \$1,900/job), 20% e-commerce (\$5.25/order), 10% corporate. COGS: 42% (\$798/job: \$528 labor, \$270 materials). Gross margin 58% by Month 7. Fixed costs \$15,700/month. Break-even at 171 jobs (Month 14). Year 1 net loss (\$28,800) turns to \$150,200 net profit in Year 2.

Seeking \$250,000: \$100,000 owner equity, \$100,000 SBA 7(a) loan (6.5%, 10-year), \$50,000 angel (10% equity). Funds cover \$248,500 startup costs (equipment \$45,000, salaries \$96,000, marketing \$25,000) and 6 months' runway. Milestones: 220 jobs Year 1, 400 Year 2, \$1.1M revenue Year 3. ROI: 3.2x by Year 5 based on 8x EBITDA exit multiple.

## SECTION 2: COMPANY OVERVIEW

Texas LLC formed March 15, 2024 for liability protection and pass-through taxation. Austin location chosen for 3.2% annual population growth (U.S. Census) and 42,000 annual moves (Texas DOT). Ownership: Jordan Thompson 60%, Maria Delgado 30%, David Chen 10%. Registered with Texas Comptroller (Reg #123456789) and TDLR (License #MVR12345).

Thompson scaled operations at Two Men and a Truck Austin from \$1.2M to \$8.2M revenue (2018-2023), reducing damage claims by 27%. Delgado managed packing for 1,200+ relocations/year at ReloPro Logistics (2019-2023), achieving 94% customer satisfaction. Chen (CPA) structured \$3.1M SBA financing for logistics firms at Dallas Capital Partners (2015-2023).

Date	Milestone	Status	Next Steps
Mar 15, 2024	LLC formation	Complete	N/A
Apr 10, 2024	SBA loan application submitted	Complete	Secure approval by May 30
May 1, 2024	6 technicians certified	Complete	Train 2 more by June 15
Jun 1, 2024	First 10 jobs completed	Complete	Achieve 20 jobs/month by Aug
Sep 1, 2024	Integrate with 3 moving partners	Complete	Add 2 e-commerce platforms by Q1 2025
Dec 31, 2024	220 total jobs	Target	Secure Dallas expansion capital
Mar 31, 2025	Break-even achieved	Target	Launch mobile dispatch app
Jun 30, 2025	40 jobs/month capacity	Target	Begin Houston market research

## SECTION 3: MARKET ANALYSIS

TAM: \$23.1B U.S. moving industry (IBISWorld 2023). SAM: \$1.8B Texas packing services (7.8% of TAM based on Texas population share). SOM: \$18.5M Central Texas packing segment (1.03% of SAM). Calculation: 42,000 annual moves in Central Texas (Texas DOT) x 70% packing adoption x \$625 avg. spend = \$18.27M. We target 0.1% SOM (\$18,500) in Year 1, scaling to 1.5% (\$277,500) by Year 3.

Residential segment (70%): Homeowners 25-55 earning \$65K-\$150K. Budget: \$1,200-\$3,500 (72% pay full-service). E-commerce (20%): Shopify/Etsy sellers with 1-10 employees, shipping 200-500 orders/month, willing to pay \$0.50-\$1.50 extra per order for branded packing. Corporate (10%): Offices with 10-50 employees relocating, budgeting \$1,500-\$5,000.

Key trends: 61% consumers demand eco-materials (Nielsen 2023), driving 22% premium pricing opportunity. 42% e-commerce businesses outsource packing (Shopify 2023) due to 34% labor shortage (BLS). Moving industry growing at 5.2% CAGR (IBISWorld) with e-commerce packing segment at 9.1% CAGR.

Segment	Size (\$)	Growth Rate	Our Share Target	Rationale
Residential Movers	12,950,000	5.2%	0.1% (Y1)	220 jobs x \$1,900 = \$418,000
E-commerce	3,700,000	9.1%	0.05% (Y1)	800 orders x \$5.25 = \$4,200
Corporate Relocations	1,850,000	4.8%	0.1% (Y1)	22 jobs x \$1,500 = \$33,000
Senior Transitions	925,000	6.3%	0.2% (Y1)	22 jobs x \$1,500 = \$33,000

Category	Total Addressable	Serviceable Available	Serviceable Obtainable	Methodology
Residential	16,187,500,000	1,127,000,000	12,950,000	TAM x 7% (Texas pop) x 70% (packing adoption)
Commercial	6,912,500,000	481,000,000	5,550,000	TAM x 7% x 30% (commercial moves)

## SECTION 4: COMPETITIVE ANALYSIS

Direct competitors: Two Men and a Truck Austin (\$1.2M revenue, 45% gross margin) charges \$140/hour with untrained crews. PODS Local Austin (\$850K revenue) offers container-based packing at \$1,800 flat rate but no on-site expertise. 12 independent movers (avg. \$250K revenue) lack insurance and eco-materials. Indirect: U-Haul DIY kits (\$150 avg. spend) cause 23% damage rate (U-Haul 2023 claims data).

Our advantages: 1) Certified technicians (40-hour training) reduce damage claims to 0.8% vs. industry 3.2% (U.S. Moving Association), saving \$217/job in claims. 2) Eco-materials at 15% premium (\$350/job vs. \$305 industry avg.) with 61% consumer preference (Nielsen). 3) Flat-rate pricing eliminates billing disputes (industry 28% dispute rate). 4) Partner integrations drive 35% referral revenue at 40% lower CAC.

Competitor	Revenue Est.	Pricing	Key Strength	Key Weakness	Our Differentiation
Two Men and a Truck	1,200,000	Hourly (\$140)	Brand recognition	Untrained crews (32% turnover)	Certified packers (15% turnover target)
PODS Local	850,000	Flat \$1,800	Container convenience	No on-site expertise	On-site specialists + damage guarantee
Local Movers Inc.	250,000	Hourly (\$95)	Low cost	No insurance (\$0 coverage)	\$2M liability + \$5k/job damage protection
U-Haul DIY	N/A	\$150 avg.	Low price	23% damage rate	0.8% damage rate (certified handling)
Austin EcoPak	180,000	Flat \$1,600	Eco-materials	Limited capacity (2 crews)	Scalable crew model (6+ technicians)

Strengths	Weaknesses	Opportunities	Threats
Certified technicians (40-hr training)	Limited brand awareness (0% recall)	E-commerce growth (9.1% CAGR)	Unlicensed movers undercutting prices
Eco-materials standard (61% preference)	Seasonal demand (Q1 25% below avg.)	Senior transition market (6.3% growth)	Material cost inflation (8.2% in 2023)
Flat-rate pricing (28% lower disputes)	Dependent on 2 founders	Corporate relocation partnerships	TDLR regulation changes

Partner integrations (35% referral revenue)	Warehouse dependency	Texas population growth (3.2% annual)	Economic downturn reducing moves
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## SECTION 5: PRODUCTS & SERVICES

Residential full-service packing: Technicians disassemble furniture, wrap fragile items in biodegradable air pillows (EcoEnclose), label rooms, and provide unpacking assistance. Includes \$5,000 damage protection. E-commerce fulfillment: Custom-branded mailers with kraft paper fill (FSC-certified), photo documentation, and Shopify API integration. Senior transition: 8-hour service with donation coordination and photo logs of heirlooms.

Pricing set at 12% premium to competitors based on damage reduction value (\$217/job savings). Residential full-service: \$1,200 (1-bed) to \$3,500 (4+ bed) vs. competitors' \$950-\$2,800. E-commerce: \$3.50-\$7.00/order vs. \$3.00-\$6.50 industry avg. Military/senior 10% discount maintains 55% gross margin. Bundles with moving partners at 15% discount drive 22% higher order value.

Tier	Price	Features	Target Customer	% Revenue	Gross Margin
Full-Service Residential	1,200-3,500	All rooms packed, disassembly, damage protection	Homeowners	70%	56%
E-commerce Fulfillment	3.50-7.00/order	Branded packaging, photo docs, API integration	Shopify sellers	20%	62%
Senior Transition	1,500 (8-hr)	Sorting, donation coord, photo logs	Seniors	7%	59%
DIY-Assist	75-150	Kit rental, 2-hr consultation	Budget movers	3%	78%

Metric	Value	Calculation/Notes
Price per residential job	1,900	Avg. of 220 jobs: 65% 1-bed (\$1,200), 25% 2-bed (\$1,800), 10% 3+ bed (\$2,600)
COGS per job	798	Labor: 3.8 hrs x \$22/hr x 2 techs = \$167.20; Materials: \$270; Overhead allocation: \$360.80
Gross Profit per job	1,102	1,900 - 798
Gross Margin %	58.0%	1,102 / 1,900

CAC	285	Marketing spend \$30,000 / 105 customers
LTV	2,850	1,900 avg. revenue x 1.5x (1.5 repeat jobs) x 50% gross margin / 5% monthly churn
LTV:CAC	10.0	2,850 / 285
Payback Period	2.6 months	CAC / (Gross profit per job x monthly jobs per customer)

## SECTION 6: MARKETING & SALES

Primary channel: Google Ads targeting "professional packing service Austin" (1,300 monthly searches, \$2.40 CPC). Secondary: Real estate agent partnerships (8% referral fee) covering 42% of Austin moves. Tertiary: Senior Expo sponsorships (\$2,500/event) targeting 65+ demographic. CAC target: \$285 (vs. \$320 industry avg.) via 6% conversion rate from leads.

Sales cycle: 1) Lead from website/call (15-min consult), 2) On-site assessment (\$50 creditable), 3) Quote within 2 hours, 4) 25% deposit to book. Conversion: 65% consult-to-assessment, 72% assessment-to-booking. Average cycle: 4.2 days. 82% close rate on assessments.

Retention: Loyalty program (10% off after 3 jobs) targets 35% repeat rate. Referral bonus (\$100) drives 22% new customers. Email nurture (4 campaigns/month) achieves 28% open rate. Target churn: 4.8% monthly (vs. 7.1% industry avg.). Expansion revenue: 18% from upsells (e.g., full-service to partial).

Channel	Monthly Budget	Expected CAC	Expected Leads/Month	Conversion Rate	Expected Customers/Month	ROI
Google Ads	2,000	667	27	6.0%	1.6	1.8x
Real Estate Partners	1,200	150	8	100%	8.0	12.3x
Social Media Ads	800	400	2	5.0%	0.1	0.7x
Senior Expos	625	250	2.5	8.0%	0.2	5.6x
Content/SEO	500	300	1.7	5.9%	0.1	1.3x
Total	5,125	285	41.2	6.0%	10.0	5.0x

Month	Google Ads	Social Media	Content/SEO	Events	Other	Total	Expected Leads	Expected Customers
1	1,000	400	250	0	500	2,150	12	0.7
2	1,500	600	350	0	500	2,950	20	1.2
3	2,000	800	500	0	500	3,800	27	1.6
4	2,000	800	500	1,250	500	5,050	30	1.8
5	2,000	800	500	1,250	500	5,050	30	1.8
6	2,000	800	500	1,250	500	5,050	30	1.8
7	2,000	800	500	1,250	500	5,050	30	1.8
8	2,000	800	500	1,250	500	5,050	30	1.8
9	2,000	800	500	1,250	500	5,050	30	1.8
10	2,000	800	500	1,250	500	5,050	30	1.8
11	2,000	800	500	1,250	500	5,050	30	1.8
12	2,000	800	500	1,250	500	5,050	30	1.8

Y1 Total	22,500	9,000	5,600	12,500	6,000	55,600	339	21.0
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## SECTION 7: OPERATIONS

Daily workflow: 1) Lead booked via Calendly, 2) CRM assigns 2 technicians, 3) Pre-job material kit assembled (200 boxes in rotation), 4) On-site packing (avg. 5.2 hours), 5) Post-job review in Salesforce. Capacity: 8 jobs/day with 6 technicians. Peak season (May-August) adds 2 contractors. Quality control: Photo documentation of fragile items, supervisor spot-checks 20% of jobs.

Primary supplier: ULINE for boxes/tape (5% discount at \$10K/month volume). Secondary: EcoEnclose for biodegradable materials (10% discount at \$5K/month). Backup: Austin Recycled Boxes (local, 48-hour delivery). Technology: Salesforce (\$75/user/month), Calendly (\$12/month), QuickBooks Online (\$30/month), Stripe (2.9% + \$0.30).

Vendor/Supplier	Service	Monthly Cost	Contract Terms	Backup Option
ULINE	Boxes, tape, labels	1,200	Net 30, 5% discount >\$10K	Austin Recycled Boxes
EcoEnclose	Eco mailers, air pillows	600	Net 30, 10% discount >\$5K	Packsize (on-demand)
Salesforce	CRM	150	Annual contract	HubSpot (free tier)
QuickBooks Online	Accounting	30	Monthly	Xero (\$25/month)
Stripe	Payments	145	Per transaction	Square (2.6% + \$0.10)
Austin Moving Equip	Hand trucks	200	On-demand rental	U-Haul (\$19.95/day)

Tool	Purpose	Monthly Cost	Users	Alternatives Considered
Salesforce	Lead tracking, follow-ups	150	3	HubSpot (chose for CRM scalability)
Calendly	Booking/scheduling	12	1	Acuity (chose for Google Calendar sync)
QuickBooks Online	Invoicing, accounting	30	2	Wave (chose for SBA reporting)
Stripe	Payment processing	145	1	Square (chose for lower chargebacks)
Google Workspace	Email, docs	18	3	Microsoft 365 (\$6/user)

## SECTION 8: MANAGEMENT TEAM

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Structure: Flat hierarchy with COO managing operations, CEO handling sales/strategy. Compensation: COO \$60,000 base + 5% revenue bonus after \$350K revenue. Technicians \$22/hour + \$50/job bonus for zero damage. No salaries >\$75,000 until Year 2 profitability. Advisory board: 2 logistics VPs (equity: 0.5% each).

Chen (CFO consultant) provides SBA compliance and financial modeling at \$150/hour (20 hrs/month). Advisory board includes ex-VP of Operations at PODS (20 years experience) and founder of EcoEnclose (supplier partnership).

Month	Role	Salary	Priority	Source	Onboarding Time
1	Office Admin (PT)	3,000	High	Craigslist	2 weeks
2	Technician (2)	3,520	High	Indeed	3 weeks
3	Technician (2)	3,520	Medium	Employee referral	2 weeks
4	Technician (2)	3,520	Medium	Indeed	3 weeks
6	Sales Coordinator	3,250	Low	Internal promotion	4 weeks
9	Warehouse Manager	4,000	Low	Industry referral	3 weeks

## SECTION 9: FINANCIAL PLAN

Key assumptions: 15 new customers/month Year 1 (ramp from 0.7 to 1.8), 25/month Year 2. Avg. revenue per job: \$1,900 Year 1, \$1,950 Year 2. Monthly churn: 4.8%. COGS: 42% (\$798/job). Fixed costs: \$15,700/month. Marketing CAC: \$285. Break-even at 171 jobs (14.3/month).

Revenue drivers: 1) Real estate partnerships (35% of revenue at 8% referral fee), 2) E-commerce growth (20% of revenue at 9.1% CAGR), 3) Seasonal summer peak (May-August = 55% of annual volume). Pricing maintains 58% gross margin vs. industry 45-50% through labor efficiency (3.8 hrs/job vs. 5.2 industry avg.).

Cost structure: 55% fixed costs (salaries, rent, software), 45% variable (labor, materials, payment processing). Fixed costs scale linearly: +\$4,000/month per 10-jobs capacity increase. Variable costs: \$528 labor/job (2 techs x 3.8 hrs x \$22/hr), \$270 materials/job. Loan payment: \$1,083/month (SBA 7a, \$100k at 6.5%, 10-year).

Funding: \$250,000 covers \$248,500 startup costs and 6 months' runway. \$100k equity (founders \$80k, angel \$20k), \$100k SBA loan, \$50k angel (10% equity). Milestones: \$420k revenue Year 1, break-even Month 14, \$1.1M revenue Year 3. Runway: 18 months post-funding.

Category	Item	Cost	Notes
Legal/Formation	Texas LLC filing	\$300	State fee
Legal/Formation	Operating agreement	\$1,500	Attorney fees
Licenses/Permits	TDL license	\$500	Moving authority
Licenses/Permits	Sales tax permit	\$300	Texas Comptroller
Equipment	Hand trucks (4)	\$1,200	\$300 each
Equipment	Pack toolkits (6)	\$1,800	\$300 each

Equipment	\$1,000	Shrink wrap machine	
Technology Setup	\$3,500	Web development	WordPress + WooCommerce
Technology Setup	\$1,200	CRM setup	Salesforce configuration
Initial Inventory	\$4,500	Boxes (200)	ULINE bulk order
Initial Inventory	\$2,000	Eco materials	EcoEnclose starter kit
Marketing Launch	\$2,500	Branding	Logo, signage
Marketing Launch	\$10,000	Launch campaign	Google Ads, events
Working Capital	\$75,600	3 months OpEx	\$25,200 x 3
Insurance	\$15,000	Annual premiums	Liability, workers' comp
Professional Fees	\$2,500	Accounting setup	SBA loan prep
Office Setup	\$2,400	Warehouse deposit	2 months @ \$1,200

Office Setup	Shelving	5,000	
Training	Certification program	8,000	Materials trainer
Contingency	10% buffer	24,850	
<b>Total</b>		<b>248,500</b>	

Category	Monthly Cost	Annual Cost	Notes
Rent	Fixed 2,200	26,400	Office \$1,000 + warehouse \$1,200
Salaries	Fixed 12,000	144,000	COO \$5,000 + admin \$1,500 + techs \$5,500
Benefits	Fixed 1,440	17,280	12% of payroll
Insurance	Fixed 1,250	15,000	
Software	Fixed 600	6,000	Salesforce, QuickBooks, etc.
Utilities	Fixed 400	4,800	Electric, internet
Marketing	Fixed 3,000	30,000	See Section 6
Professional Services	Fixed 600	3,600	Accounting, legal



EBIT	-15,788	-20,028	-10,026	-5,164	-2,960	1,448	3,652	5,856	1,448	-2,960	-5,164	1,448	-49,400
Interest	542	542	542	542	542	542	542	542	542	542	542	542	6,500
Taxes (25%)	0	0	0	0	0	0	778	1,328	0	0	0	0	2,106
Net Income	-16,330	-20,570	-10,568	-5,706	-3,502	906	2,874	4,528	906	-3,502	-5,706	906	-28,800

Line Item	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
Beginning Cash	250,000	233,670	213,100	202,532	196,826	193,324	194,230	197,104	201,632	202,538	199,036	193,330
Cash In (Revenue)	1,400	2,400	22,800	34,200	38,000	45,600	49,400	53,200	45,600	38,000	34,200	45,600
Cash In (Funding)	250,000	0	0	0	0	0	0	0	0	0	0	0
Total Cash In	251,400	2,400	22,800	34,200	38,000	45,600	49,400	53,200	45,600	38,000	34,200	45,600
Cash Out (COGS)	588	1,008	9,576	14,364	15,960	19,152	20,748	22,344	19,152	15,960	14,364	19,152
Cash Out (OpEx)	15,600	20,420	22,250	24,000	24,000	24,000	24,000	24,000	24,000	24,000	24,000	24,000
Cash Out (CapEx)	45,000	0	0	0	0	0	0	0	0	0	0	0
Cash Out (Debt)	0	0	0	0	0	1,083	1,083	1,083	1,083	1,083	1,083	1,083
Total Cash Out	61,188	21,428	31,826	38,364	39,960	44,235	45,831	47,427	44,235	41,043	39,447	44,235
Net Cash Flow	190,212	-19,028	-9,026	-4,164	-1,960	1,365	3,569	5,773	1,365	-3,043	-5,247	1,365
Ending Cash	233,670	213,100	202,532	196,826	193,324	194,230	197,104	201,632	202,538	199,036	193,330	194,236

Metric	Y1	Y2 Q1	Y2 Q2	Y2 Q3	Y2 Q4	Y3 Q1	Y3 Q2	Y3 Q3	Y3 Q4	Y3 Total
Revenue	420,000	220,500	231,525	243,101	255,256	268,019	281,420	295,491	310,266	1,155,196
COGS	176,400	92,610	97,241	102,102	107,208	112,568	118,196	124,106	130,312	485,182
Gross Profit	243,600	127,890	134,284	141,000	148,048	155,451	163,224	171,385	179,954	670,014
OpEx	281,000	75,550	79,328	83,294	87,459	91,832	96,424	101,245	106,307	395,812

EBITDA	-37,400	52,340	54,956	57,706	60,589	63,619	66,800	70,140	73,647	274,202
Net Income	-28,800	39,255	41,217	43,279	45,442	47,714	50,100	52,605	55,235	205,666
Ending Cash	194,236	290,000	390,000	495,000	605,000	720,000	840,000	965,000	1,095,000	1,095,000

Metric	Value	Calculation
Monthly Fixed Costs	15,700	OpEx \$25,200 - variable \$9,500
Variable Cost per Job	798	COGS breakdown
Price per Job	1,900	Average revenue
Contribution Margin per Job	1,102	1,900 - 798
Contribution Margin %	58.0%	1,102 / 1,900
Break-Even Units per Month	14.3	15,700 / 1,102
Break-Even Revenue per Month	27,170	14.3 x 1,900
Expected Break-Even Month	14	Based on P&L projections
Safety Margin	26.5%	(21 actual jobs - 14.3 BE) / 21

Metric	Y1	Y2	Y3	Industry Benchmark
Gross Margin %	58.0%	58.0%	58.0%	45-50%
Operating Margin %	-6.7%	19.4%	23.9%	5-10%
Net Profit Margin %	-6.9%	19.2%	18.7%	3-8%
Current Ratio	1.8	2.5	3.1	1.5-2.0

Quick Ratio	1.5	2.2	2.8	1.0-1.5
CAC Payback	2.6 months	2.4 months	2.2 months	6-18 months
LTV:CAC	10.0	10.4	10.9	3:1
Monthly Burn Rate	2,400	N/A	N/A	N/A
Runway (months)	18	N/A	N/A	N/A

## SECTION 10: RISK ANALYSIS

Top risks: 1) Unlicensed movers undercutting prices (Probability 4/5, Impact \$120K revenue loss). 2) Material cost inflation (Probability 3/5, Impact 5% margin erosion). 3) Technician turnover (Probability 4/5, Impact 15% capacity loss). 4) SBA loan delay (Probability 2/5, Impact 3-month runway reduction).

Mitigation: 1) Emphasize \$5,000 damage protection in marketing (saves \$217/job vs. competitors' \$0 coverage). 2) Multi-vendor sourcing (ULINE + EcoEnclose + local) with 3-month inventory buffer. 3) \$50/job damage-free bonus reduces turnover to 15% (vs. industry 32%). 4) Pre-qualified SBA application with \$25k credit union LOC backup.

Risk	Probability	Impact	Risk Score	Mitigation Strategy	Contingency Plan	Owner
Unlicensed competition	4	4	16	Highlight insurance/damage protection in all marketing	Match price for military/seniors (10% discount)	CEO
Material inflation	3	4	12	Multi-vendor contracts with 6% annual cap	Pass 50% cost to customers after 8% increase	COO
Technician turnover	4	3	12	\$50/job bonus + career path to supervisor	Contract labor pool (2 pre-vetted per market)	COO
SBA loan delay	2	5	10	Pre-qualified application with SBA preferred lender	Draw \$25k credit union LOC (6.9% interest)	CFO
Seasonal demand dip	5	3	15	E-commerce diversification (20% target revenue)	Winter senior transition promotions (15% discount)	CEO
Damage claims	3	4	12	Certified training + photo documentation	\$5k/job self-insured retention	COO
Marketing CAC increase	3	3	9	Shift budget to real estate referrals (82% close rate)	Suspend social ads, focus on organic SEO	CEO
Partner termination	2	4	8	Diversify to 5+ moving partners by Year 2	Increase direct Google Ads budget by 25%	CEO

## SECTION 11: IMPLEMENTATION TIMELINE

Year 1 priorities: Achieve 220 jobs, break-even by Month 14, secure 3 moving partnerships. Critical path: Technician certification (Month 3), SBA approval (Month 2), and real estate partnership rollout (Month 4). Dependencies: Warehouse lease signed before Month 2 for material storage, CRM setup complete before first lead.

Month	Milestone	Deliverables	Resources Needed	Success Metric	Owner
1	Legal/financial setup	SBA application, LLC docs, bank account	\$10k legal budget	SBA submission complete	CFO
2	Team recruitment	2 certified technicians, office admin	\$5k recruitment budget	4 staff trained	COO
3	Supplier contracts	ULINE/EcoEnclose agreements	\$15k inventory budget	30-day payment terms secured	COO
4	First partnerships	3 real estate agent contracts	8% referral fee budget	10% of leads from referrals	CEO
5	Marketing launch	Google Ads live, 500 leads generated	\$5k ad budget	6% conversion rate	CEO
6	100 jobs completed	100 jobs, 4.5-star avg. rating	Full technician team	95% on-time completion	COO
7	Process optimization	Time-per-job reduced to 5.2 hrs	Training materials	10% labor cost reduction	COO
8	E-commerce pilot	2 Shopify seller contracts	API integration dev	\$1,000 monthly revenue	CEO
9	Break-even path	14.3 jobs/month average	Full marketing budget	Cash flow positive	CFO
10	Senior program launch	2 retirement community contracts	\$2k expo budget	5 senior jobs/month	CEO
11	Year 1 review	220 jobs, \$420k revenue	Financial close	58% gross margin achieved	CFO
12	Dallas expansion plan	Market analysis, budget proposal	\$5k research budget	Feasibility report approved	CEO

## SECTION 12: APPENDIX

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Full documentation available: SBA loan package, technician training curriculum, supplier contracts, and customer survey data. Key assumptions validated by U.S. Moving Association, Nielsen, and IBISWorld reports. Financial model uses conservative 5.2% industry growth rate and 4.8% monthly churn based on 2023 logistics industry benchmarks.