



WELCOME

# Unleash Your Business's Full Potential

Innovative solutions to help small and mid-sized businesses drive success and growth.

**BOOK A NO COST 30-MINUTE  
BUSINESS CONSULTATION**

# STARTUP

## COMPREHENSIVE

# WORKBOOK





## DISCLAIMER

**This planner** is developed as an aid and for information. It should not be used or considered as legal advice. We encourage you to seek legal counsel when building your business.

# WHY DID YOU START YOUR BUSINESS?

**Congratulations!** Starting a business is no small feat. Many people have amazing ideas but don't put the effort into building a business. This business is probably very special to you. Let's document it.

→ Why did you start this business?

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→ Why does this matter so much to you?

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→ What is at stake if you don't do this?

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→ What would happen if you were successful?

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# WHAT PRODUCTS OR SERVICES DO YOU OFFER?

**Successful businesses** are all about offering something people want/need. This starts with having a solid vision of what this/these things are, and how you will execute them. As you build up a customer base, you will see that their needs will increase, and they may even request additions to what you offer. Planning ahead for this helps you be more prepared.

Describe your product like you would to a customer.

How it could grow over time.



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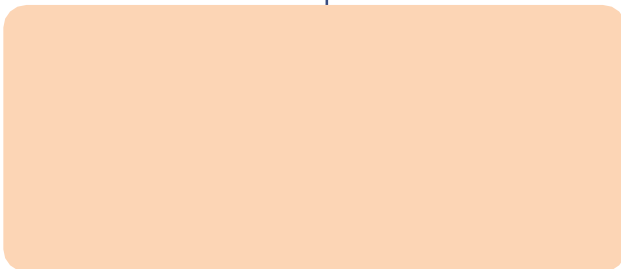
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## YOUR CUSTOMER PERSONA: DEMOGRAPHICS

**Understanding your ideal customer** will help you develop products and your future marketing and advertising strategies. Creating a vision of who your customer is known as a “customer persona.” Even the smallest details helps you see precisely how to improve. Complete this page to build a persona of your customer. You might also create other personas of secondary buyers.

Name:

Age:

Gender:

Relationship Status:

Religious Affiliation:

Location:

Occupation:

Annual Income:

Income Leftover From Bills  
(Can they afford you?):

# YOUR CUSTOMER PERSONA: PSYCHOGRAPHICS

Motivations:

Goals:

Frustrations:

Biggest Fears:

What Drives Them:

Brands They Love:

Brands They Don't Love:

Who They Look Up To:

Who They Dislike/Kind Of  
People They Avoid:

Bio:

Day In The Life:



# YOUR BUSINESS REGISTRATION

**Depending on where your business** is in its growth process, you should definitely consider how to register it. Different countries have different names and processes for registration. On this page, your goal is to document your registration information, or gather the information you will need to register if you haven't. Keeping this handy will help throughout different points of your business.

→ Business Name: \_\_\_\_\_

→ Business Address: \_\_\_\_\_

Names of Partners	% Share
_____	_____
_____	_____
_____	_____
_____	_____

→ Employee Identification Number(s)/EIN (for tax purposes): \_\_\_\_\_

→ Company Shares/Shareholders (if applicable): \_\_\_\_\_

→ Registered Agent (if applicable): \_\_\_\_\_

→ Licenses and Permits (if applicable): \_\_\_\_\_

→ Existing Registry Details if Already Obtained: \_\_\_\_\_

## TRADEMARK, PATENT, OR COPYRIGHT

For many businesses, it's important to have certain legal protections in place. Some of these are confusing. Here is a quick rundown of the differences between a trademark, patent, and copyright:

**Trademark** - This kind of protection applies to a name, logo, or slogan that sets a product or service apart. An example of a trademark would be the golden arches of McDonald's. They don't say the name of the company, but they symbolize it and make it easily recognizable.

**Patent** - A patent is something usually applied to a unique process, or equipment. This gives them total power over their invention for up to 20 years. This includes the manufacturing, import/export, selling, and usage of the invention.

**Copyright** - You can apply for a copyright for original "fixed" works such as poems, sculptures, musical compositions, or film pieces.

On the next page, consider which of these might apply to your business.

Which aspects of your business apply to **a Trademark?**

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If you have a Trademark already, fill in the details here:

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Which aspects of your business apply to **a Patent?**

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If you have a Patent already, fill in the details here:

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Which aspects of your business apply to **a Copyright?**

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If you have a Copyright already, fill in the details here:

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→ If you haven't applied for any of these, why? What are your next steps?

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# INSURANCE

You probably know all about medical, home, and car insurance. However, for business insurance, there are several kinds that cover specific things. Here are 7 of the most common types of business insurances to be aware of. (Remember that there is no one-size-fits-all plan, and each will have to be tailored to the specifics of your business)

**Business Interruption** - This applies if you want to make sure a catastrophic event that affects your business operations doesn't mean you lose everything.

**Product Liability** - This is necessary for your protection if your business is selling products of any kind.

**Professional Liability** - This policy will vary depending on your business, but is generally used for negligence claim protection.

**Property** - Just like homeowner's insurance, property insurance protects your business's property from damages by fires, storms, or theft. Other policies connected to property insurance can apply to other details and risks your business property might be subject to.

**Vehicle** - If your business uses vehicles, you need to get vehicle insurance to protect you in the event of an accident.

**Workers' Compensation** - If and when you have employees (more on that later), it is crucial to make sure you cover any injuries or medical conditions during their employment.

On the next page, mark down which insurance(s) you need for your business, as well as the details for each.

**Business Interruption**

Yes     No

Pertinent details about the coverage

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Cost \_\_\_\_\_

Renewal Date \_\_\_\_\_

Notes \_\_\_\_\_

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**Product Liability**

Yes     No

Pertinent details about the coverage

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Cost \_\_\_\_\_

Renewal Date \_\_\_\_\_

Notes \_\_\_\_\_

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**Professional Liability**

Yes     No

Pertinent details about the coverage

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Cost \_\_\_\_\_

Renewal Date \_\_\_\_\_

Notes \_\_\_\_\_

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**Property**

Yes     No

Pertinent details about the coverage

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Cost \_\_\_\_\_

Renewal Date \_\_\_\_\_

Notes \_\_\_\_\_

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**Vehicle**

Yes     No

Pertinent details about the coverage

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Cost \_\_\_\_\_

Renewal Date \_\_\_\_\_

Notes \_\_\_\_\_

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**Workers' Comp**

Yes     No

Pertinent details about the coverage

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Cost \_\_\_\_\_

Renewal Date \_\_\_\_\_

Notes \_\_\_\_\_

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## WEBSITE DOMAIN NAME(S) AND DETAILS

**Every business needs** a website nowadays. People visit websites to get a feel for what your business is and decide whether they would like to use your services. Sometimes it's difficult to keep track of your website's information, especially if you're running multiple websites for your business ideas! You also need to keep track of visitor analytics to see what works to bring in customers and what doesn't. Record your domain names, and analytic tracking tools here. Make copies of this page for other domains.

● Website Domain: \_\_\_\_\_

Back Office Password: \_\_\_\_\_

→ Tracking Tool 1: \_\_\_\_\_

What does it track? \_\_\_\_\_

→ Tracking Tool 2: \_\_\_\_\_

What does it track? \_\_\_\_\_

→ Tracking Tool 3: \_\_\_\_\_

What does it track? \_\_\_\_\_

→ Tracking Tool 4: \_\_\_\_\_

What does it track? \_\_\_\_\_

→ Tracking Tool 5: \_\_\_\_\_

What does it track? \_\_\_\_\_

## CLIENT/CUSTOMER CONTACT INFORMATION

**As your business develops**, you will see repeat customers/clients. If you have an email list, you'll also find that you have a long list of potential customers/ clients that may or may not have requested your services or hired you yet. For this workbook, we're going to focus on people that keep coming back for your products/services. This can help you decide if you want to offer them a freebie, or another kind of deal for being a loyal customer. It will also allow you to make them feel special by remembering them. This will help your business's image, and give them some inspiration to tell their friends about you, or leave a 5-star review! Keep track of your repeat customers and how often you see them.

Name:

Email:

Phone Number:

Address:

Usual Order/Service:

How Often They Return:

Level of Difficulty (1-10 scale): 1 -

2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10

Name:

Email:

Phone Number:

Address:

Usual Order/Service:

How Often They Return:

Level of Difficulty (1-10 scale): 1 -

2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10

Name:

Email:

Phone Number:

Address:

Usual Order/Service:

How Often They Return:

Level of Difficulty (1-10 scale): 1 -

2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10

Name:

Email:

Phone Number:

Address:

Usual Order/Service:

How Often They Return:

Level of Difficulty (1-10 scale): 1 -

2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10

# PARTNER CONTACT INFORMATION

**If you have business partners**, it's important to keep in touch with them to discuss any important things that come up. You should also each have clear roles within the business, so everyone can lean into their strengths to work together and help it grow. Being able to communicate clearly with each other and know each others' roles will allow you to make the best possible decisions together that will propel your business forward.

→ Name: \_\_\_\_\_

Title/Role: \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_

What They Do: \_\_\_\_\_  
\_\_\_\_\_

Strength & Weaknesses: \_\_\_\_\_  
\_\_\_\_\_

→ Name: \_\_\_\_\_

Title/Role: \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_

What They Do: \_\_\_\_\_  
\_\_\_\_\_

Strength & Weaknesses: \_\_\_\_\_  
\_\_\_\_\_

→ Name: \_\_\_\_\_

Title/Role: \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_

What They Do: \_\_\_\_\_  
\_\_\_\_\_

Strength & Weaknesses: \_\_\_\_\_  
\_\_\_\_\_

→ Name: \_\_\_\_\_

Title/Role: \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_

What They Do: \_\_\_\_\_  
\_\_\_\_\_

Strength & Weaknesses: \_\_\_\_\_  
\_\_\_\_\_



## SOCIAL MEDIA/EMAIL ACCOUNTS

**Social media is a good way** to show off your brand, who you are, what you do, and more. Depending on your business, your choice of social media platforms will vary. For example, a law firm may not get as much traffic from Pinterest as a handmade, funky candle company. You want to be where your ideal customers hang out. Track your social accounts here.

● Platform:

Handle:

Email address used:

2 Factor Authentication (2FA):

On  Off

2FA Recovery number:

2FA Recovery email:

Password hint:

● Platform:

Handle:

Email address used:

2 Factor Authentication (2FA):

On  Off

2FA Recovery number:

2FA Recovery email:

Password hint:

● Platform:

Handle:

Email address used:

2 Factor Authentication (2FA):

On  Off

2FA Recovery number:

2FA Recovery email:

Password hint:

● Platform:

Handle:

Email address used:

2 Factor Authentication (2FA):

On  Off

2FA Recovery number:

2FA Recovery email:

Password hint:



# BRANDING

**Every business needs good branding** to help it stand out and be easily recognizable. You also want your branding to match your type of business. Take some time to reflect on your business, what it's all about, and develop your branding if you haven't already. Search the web for inspiration, and you can also play with websites like [coolers.co](http://coolers.co) and [mixfont.com](http://mixfont.com) to see what kind of colors and fonts you feel fit your business the best. Save all your branding info, so you can easily refer to it for designs across social media, advertising, and more. You'll need this more often than you think.

## → Colors

Base Color:                  Neutral Color:                  Accent Color 1:                  Accent Color 2:                  Accent Color 3:                  Extra Colors:

## → Fonts

Main Font:                                  Stylized/Accent Font:                                  Extra Font:

● Inspiration Website Name 1: \_\_\_\_\_

What You Love About It: \_\_\_\_\_

● Inspiration Website Name 2: \_\_\_\_\_

What You Love About It: \_\_\_\_\_

● Inspiration Website Name 3: \_\_\_\_\_

What You Love About It: \_\_\_\_\_

● Inspiration Website Name 4: \_\_\_\_\_

What You Love About It: \_\_\_\_\_

● Inspiration Website Name 5: \_\_\_\_\_

What You Love About It: \_\_\_\_\_

# COMPETITION INSPO

**Now we will get into how you can use your competition to inspire you to do better.**

You don't want to copy your competition, but you can gain insight into the best practices they have that bring in their customers and apply those habits in your own way. Check out your competition, and fill in what about each one inspires you to improve your own business.

→ Competition Brand 1: \_\_\_\_\_

How frequently do they post on social media?

Multiple times a day     Once a day     Once a few weeks     Hardly ever

Social media platform with largest presence: \_\_\_\_\_

How frequently do they email?

Multiple times a day     Once a day     Once a few weeks     Hardly ever

They are best at... \_\_\_\_\_

\_\_\_\_\_

How can you apply this information: \_\_\_\_\_

\_\_\_\_\_

→ Competition Brand 2: \_\_\_\_\_

How frequently do they post on social media?

Multiple times a day     Once a day     Once a few weeks     Hardly ever

Social media platform with largest presence: \_\_\_\_\_

How frequently do they email?

Multiple times a day     Once a day     Once a few weeks     Hardly ever

They are best at... \_\_\_\_\_

\_\_\_\_\_

How can you apply this information: \_\_\_\_\_

\_\_\_\_\_

# EXPENSE LIST FOR TAX/EFFICIENCY TRACKING

**We've done all the fun stuff.** It's time to get serious. Business expenses are very important to keep track of. They help you figure out if you are charging properly for your products/services and are also important to know for tax purposes. It'll also show you where you might be wasting money on something that isn't working.

Title	Cost	Renewal	Effectiveness (if applicable)
Website Hosting			
Domain Name			
Retirement Contributions			
Online Tool/Service 1			
Online Tool/Service 2			
Online Tool/Service 3			
Online Tool/Service 4			
Online Tool/Service 5			
Insurance			
Licenses/Permits			
Rent			
Electricity			
Water			
Phone/Cell Phone			
Electronic Equipment			
Office Equipment			
Office Supplies			
Travel			
Payroll			
Business Development/Courses			
Office Furniture			
Meals			



# MONTHLY PROFITS & PROFIT GOALS

**Now that you have your expenses worked out, you need to know your profit** and set some profit goals. A business won't be successful just breaking even or losing money. Profits help you live the lifestyle you want, expand your business, and so much more. This is why it's so important to keep track of them AND have goals to work towards for them.

	Months											
Profits												
Profit Goal For Next Month												
Profit Goal For Next Year												
Profit Goal For Five Years												

→ Notes

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# BUDGETING SHEET DESIGN GUIDE

**It's time to create an accounting/budget spreadsheet** to help you keep track of everything. This can help you prevent your business from going under and show you when you can splurge on extra business things you might want. Before creating your spreadsheet, brainstorm what you want to track. Below are some common items. Check them off as you create your sheet.

## Columns

- Category
- Budget
- Actual
- Difference

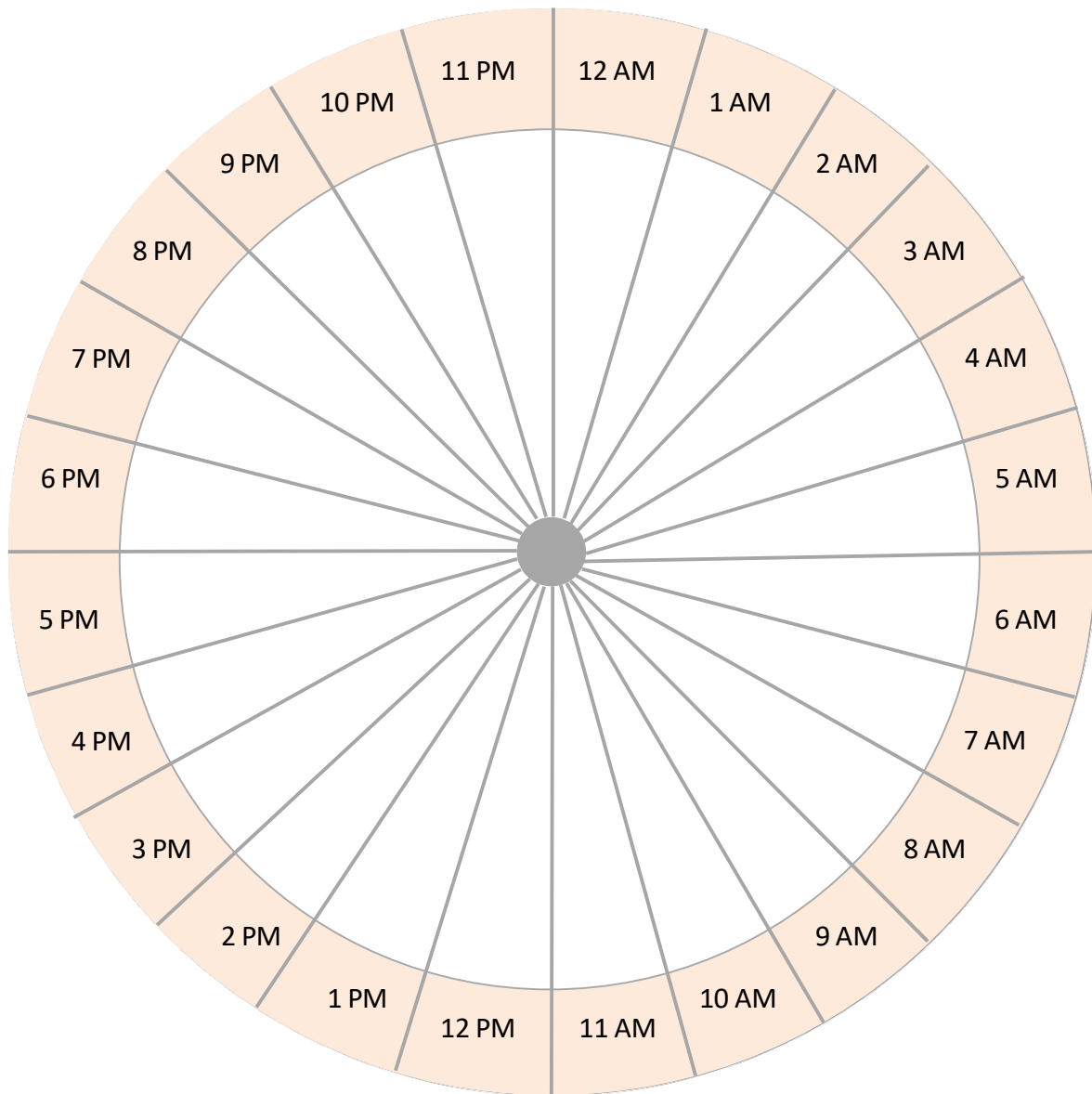
## Row Items

- Website Hosting  \_\_\_\_\_
- Domain Name  \_\_\_\_\_
- Retirement Contributions  \_\_\_\_\_
- Insurance  \_\_\_\_\_
- Licenses/Permits  \_\_\_\_\_
- Electronic Equipment  \_\_\_\_\_
- Office Equipment  \_\_\_\_\_
- Office Supplies  \_\_\_\_\_
- Travel  \_\_\_\_\_
- Payroll  \_\_\_\_\_
- Business Development/Courses  \_\_\_\_\_
- Rent  \_\_\_\_\_
- Electricity  \_\_\_\_\_
- Water  \_\_\_\_\_
- Phone/Cell Phone  \_\_\_\_\_
- Meals  \_\_\_\_\_
- Office Furniture  \_\_\_\_\_



# WORKING SCHEDULE

**Each business requires you to do multiple daily duties.** Therefore, it's important to create a daily schedule for yourself to take care of your business AND yourself. Use this page to set up a schedule. It doesn't have to be set in stone. Tweak it as you go but do not go without. It'll help your productivity tremendously.



Wake Up

Eat

Work

Exercise

Sleep

# MARKETING SCHEDULE

**Marketing can be everything** from running ads to social media posts. Trying to keep track of all these without a schedule to guide you can be difficult and frustrating. Here, create a schedule for each social media platform, as well as how often you would like to run ads for your business...

→ Month: \_\_\_\_\_

	Social Media	Email	Social Media
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____
4	_____	_____	_____
5	_____	_____	_____
6	_____	_____	_____
7	_____	_____	_____
8	_____	_____	_____
9	_____	_____	_____
10	_____	_____	_____
11	_____	_____	_____
12	_____	_____	_____

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# AUTOMATION

Email, scheduling, analytics, facility management, communication, invoicing, bills, project management, and more are all examples of things you can automate to save you time. With technology constantly changing and improving, these automation systems will only get better and more capable. Take some time to think about which tasks you have to do for your business are the most tedious. Then, research ways to automate these tasks. Record what you find here.

→ Task \_\_\_\_\_

Automation Options	Cost
_____	_____
_____	_____
_____	_____
_____	_____

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

→ Task \_\_\_\_\_

Automation Options	Cost
_____	_____
_____	_____
_____	_____
_____	_____

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

→ Task \_\_\_\_\_

Automation Options	Cost
_____	_____
_____	_____
_____	_____
_____	_____

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

→ Task \_\_\_\_\_

Automation Options	Cost
_____	_____
_____	_____
_____	_____
_____	_____

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# WHEN TO HIRE A TEAM AND HOW TO FIND THEM

**As your business grows**, you will help take on the growing workload. This process can be daunting. You should start thinking about when to hire your team before you become so overwhelmed that you need one asap... If you wait, you may end up taking on team members that aren't a good fit, creating more problems. Use the space below to answer some questions that will allow you to gauge when it's time to take this important step.

Would you say that you're currently feeling overwhelmed in your business?

Yes                      No

How many hours a week are you working  on your business?

Under 20 hours                      20 - 40 hours                      Over 40 hours

How many hours do you **want** to be working  on your business?

Under 20 hours                      20 - 40 hours                      Over 40 hours

How many hours  are too many?

5 - 10 - 15 - 20 - 25 - 30 - 35 - 40 - 45 - 50 - 55 - 60 - 60+

What tasks would you be willing to hand off to potential team members?



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→ What stops you from bringing on a team?

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→ How can you work through this so your business can grow?

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# HIRING THE RIGHT PEOPLE

**Now that you know team members are necessary** to help a thriving business continue to grow, it's important to know how to onboard them when you find them. One of the best ways to ensure you are bringing on the right people is to get most of the information you need via the application process. Use this page to help you figure out what you want in a candidate and what information to ask.

## → What They Need Need To Know

About You \_\_\_\_\_  
\_\_\_\_\_

About Your Business \_\_\_\_\_  
\_\_\_\_\_

Job Description/Duties \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Qualifications \_\_\_\_\_  
\_\_\_\_\_

Pay Rate \_\_\_\_\_ Expected Hours \_\_\_\_\_

Test Project \_\_\_\_\_  
\_\_\_\_\_

## → What You Need To Know

Name \_\_\_\_\_ Email \_\_\_\_\_

Phone Number \_\_\_\_\_

Work Experience \_\_\_\_\_  
\_\_\_\_\_

Education Experience \_\_\_\_\_  
\_\_\_\_\_

Work Samples

Resume/Cover Letter

What Inspires Them To Work \_\_\_\_\_  
\_\_\_\_\_

## CONCLUSION

We hope that this complete business planner workbook has helped you approach your business's future with a boost of confidence! As a final bonus recommendation, check out [LegalZoom.com](https://www.legalzoom.com) for any legal help you may need. This includes licenses, contracts, and even insurance, and more. They can save you a lot of time and stress, and they are also very affordable! In closing, I wish you the absolute best in your business and its growth.