

FROM THE COACHING DESK OF DR. TINA FLORES

FOUNDER OF TFIH, LLC

[WWW.TFIHLLC.COM](http://WWW.TFIHLLC.COM)

830-308-8344

# ULTIMATE BUSINESS PLANNER

*Designed to help you "Build it Bold"*



# Own your Day!

This planner is your first step. Let me help you take the rest.!

I'm Dr. Tina Flores - Elite Business Coach. and the founder of TFIH. LLC. I help bold. brilliant women like you turn vision into action. and action into income.

If you're using this planner. you already have the drive. Now imagine what you could do with expert strategy. accountability. and real support in your corner.

When you're ready to go from planning to thriving. I'm here to help you make it happen.

Learn more at [www.tfihllc.com](http://www.tfihllc.com)

You can also text me: 830-308-8344







# BUSINESS STRATEGY

## GETTING STARTED

# DETERMINE YOUR VALUE

WHAT IS THE PURPOSE BEHIND YOUR BUSINESS

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HOW DOES YOUR SERVICE/PRODUCT SERVE YOUR IDEAL CLIENT? HOW  
DOES IT HELP THEM?

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WHAT GAP IN THE MARKET WILL YOU BE ABLE TO FILL?

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# COMPETITOR ANALYSIS

This task is very effective when re-analyzing your own business or even when you are just starting. I suggest that you Select 5 other sellers of businesses that are part of the same niche that you are and analyze them. These need be successful businesses that inspire you. These competitors also need to have the same ideal client as you.

## MAKE NOTE OF THE FOLLOWING 5 THINGS IN EACH BUSINESS THAT YOU ANALYZE:

1. Marketing - Look at how other businesses are marketing their products. Do they use mainly online marketing like their website, email marketing, social media platforms, etc. Look at things like if they have a YouTube channel or a Facebook page and make notes on how they market their business there? Do they offer freebies, opt-ins, etc?
2. Website - How is their website designed? Is it more of a blog or a shop? Do they have other topics that they expand on and what do specific pages like their about and home page look like? Make notes of the best features that their website has to offer.
3. Social media presence - Do they have a strong brand presence on social media? Make notes on how they are performing well on social media. How are they communicating with their clients? If you see good engagement, take note of what they might be doing to receive this engagement.
4. How they serve their customers - What are they offering to their customers that provide value? Do they focus on a specific need or many needs?
5. Pricing of products and services- How are their products priced and what is the average pricing of their products? Do they run sales and what is their pricing strategy? (Remember it is always easier to bring a price DOWN than it is to bring a price up)

# MARKET RESEARCH

COMPETITOR ANALYSIS -THE PURPOSE OF THIS IS TO DETERMINE THE STRENGTHS AND WEAKNESSES OF THE COMPETITORS WITHIN YOUR MARKET. STRATEGIES THAT WILL PROVIDE YOU WITH A DISTINCT ADVANTAGE. THE BARRIERS THAT CAN BE DEVELOPED TO PREVENT COMPETITION FROM ENTERING YOUR MARKET. AND ANY WEAKNESSES. REMEMBER TO CHOOSE 2 COMPETITORS IN THE SAME NICHE AS YOU AND WITH VERY SIMILAR IF NOT THE SAME PRODUCTS.

ANALYZE	MY BUSINESS	COMPETITOR 1	COMPETITOR 2
STRENGTHS			
WEAKNESSES			
TOP PRODUCT			
TOP ADVANTAGE			
THREATS			

# MARKET RESEARCH

COMPETITOR ANALYSIS -THE PURPOSE OF THIS IS TO DETERMINE THE STRENGTHS AND WEAKNESSES OF THE COMPETITORS WITHIN YOUR MARKET. STRATEGIES THAT WILL PROVIDE YOU WITH A DISTINCT ADVANTAGE. THE BARRIERS THAT CAN BE DEVELOPED TO PREVENT COMPETITION FROM ENTERING YOUR MARKET. AND ANY WEAKNESSES. REMEMBER TO CHOOSE 2 COMPETITORS IN THE SAME NICHE AS YOU AND WITH VERY SIMILAR IF NOT THE SAME PRODUCTS.

ANALYZE	COMPETITOR 3	COMPETITOR 4	COMPETITOR 5
STRENGTHS			
WEAKNESSES			
TOP PRODUCT			
TOP ADVANTAGE			
THREATS			



# BUSINESS PLAN

BUSINESS NAME: \_\_\_\_\_

## CONTACT DETAILS

EMAIL ADDRESS: \_\_\_\_\_

PHONE NUMBERS: \_\_\_\_\_

## SOCIAL MEDIA HANDLES

FACEBOOK - \_\_\_\_\_

LINKEDIN - \_\_\_\_\_

INSTAGRAM - \_\_\_\_\_

PINTEREST - \_\_\_\_\_

TWITTER - \_\_\_\_\_

OTHER - \_\_\_\_\_

## PRODUCT SUMMARY

A BRIEF DESCRIPTION OF YOUR PRODUCTS AND NICHE

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## WHAT PROBLEM DO YOU SOLVE?

WHAT PAIN POINT, STRESSOR OR PROBLEM ARE YOU SOLVING IN YOUR IDEAL CLIENT'S LIFE?

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## WHAT IS YOUR SOLUTION?

HOW DOES YOUR PRODUCT SOLVE THIS SPECIFIC PROBLEM, STRESSOR OR PAIN POINT?

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# YOUR MISSION STATEMENT

## INCORPORATE THE FOLLOWING:

- WHAT YOU DO
- WHO YOU ARE DOING IT FOR
- HOW YOU DO IT
- THE VALUE YOU PROVIDE/PROBLEM YOU SOLVE
- WHY DO YOU DO WHAT YOU DO?
- WHAT PAIN POINT DO YOU AIM TO SOLVE?
- WHO DO YOU WANT TO HELP AND WHO WILL YOUR BUSINESS SERVE?
- WHAT ARE YOU PASSIONATE ABOUT IN YOUR BUSINESS?
- WHAT DRIVES YOU TO CONTINUE DOING WHAT YOU DO?
- HOW DO YOUR SERVICES/PRODUCTS SERVE YOUR IDEAL CLIENTS?
- WHAT CORE VALUES AND BELIEFS DO YOU HAVE IN YOUR BUSINESS?
- WHAT COMPETITIVE ADVANTAGE DO YOU HOLD?
- HOW WILL YOU MEASURE SUCCESS AND CONTINUE TO GROW?

STATEMENT:

[illegible]

# BRANDING CHECKLIST

## BRANDING CHECKLIST

<input type="checkbox"/> SETTING CLEAR GOALS	<input type="checkbox"/> _____
<input type="checkbox"/> MISSION STATEMENT	<input type="checkbox"/> _____
<input type="checkbox"/> IDEAL CLIENT	<input type="checkbox"/> _____
<input type="checkbox"/> BRAND STORY & WHY MY BUSINESS EXISTS	<input type="checkbox"/> _____
<input type="checkbox"/> CORE VALUES	<input type="checkbox"/> _____
<input type="checkbox"/> BRAND PERSONALITY & BRAND VOICE	<input type="checkbox"/> _____
<input type="checkbox"/> LOGO	<input type="checkbox"/> _____
<input type="checkbox"/> COLOR PALETTE	<input type="checkbox"/> _____
<input type="checkbox"/> TYPOGRAPHY & FONTS	<input type="checkbox"/> _____
<input type="checkbox"/> PATTERNS & TEXTURES	<input type="checkbox"/> _____
<input type="checkbox"/> STOCK IMAGES	<input type="checkbox"/> _____
<input type="checkbox"/> TAGLINE	<input type="checkbox"/> _____
<input type="checkbox"/> SOCIAL MEDIA GRAPHICS	<input type="checkbox"/> _____
<input type="checkbox"/> ORDER FORM	<input type="checkbox"/> _____
<input type="checkbox"/> LETTERHEAD	<input type="checkbox"/> _____
<input type="checkbox"/> BUSINESS CARDS	<input type="checkbox"/> _____
<input type="checkbox"/> PACKAGING	<input type="checkbox"/> _____
<input type="checkbox"/> INVOICES	<input type="checkbox"/> _____
<input type="checkbox"/> PRICE LISTS	<input type="checkbox"/> _____
<input type="checkbox"/> EMAIL HEADER	<input type="checkbox"/> _____
<input type="checkbox"/> EMAIL SIGNATURE	<input type="checkbox"/> _____
<input type="checkbox"/> EMAIL NEWSLETTER DESIGN	<input type="checkbox"/> _____
	<input type="checkbox"/> _____

NOTES: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# LOGO CHECKLIST

## LOGO CHECKLIST

- |  |                             |
|--|-----------------------------|
| <input type="radio"/> DOES MY LOGO CLEARLY REPRESENT MY BRAND?   | <input type="radio"/> _____ |
| <input type="radio"/> DOES MY LOGO CONTAIN NO MORE THAN 3 COLORS & 3 FONTS?  | <input type="radio"/> _____ |
| <input type="radio"/> IS MY LOGO SIMPLE AND NOT TOO BUSY WITH TOO MUCH GOING ON?   | <input type="radio"/> _____ |
| <input type="radio"/> DO THE COLORS AND FONTS TARGET MY IDEAL CLIENT?  | <input type="radio"/> _____ |
| <input type="radio"/> IS MY LOGO IN VECTOR FORMAT (IT WILL NOT PIXELATE OR LOSE QUALITY WHEN ENLARGED)?  | <input type="radio"/> _____ |
| <input type="radio"/> DO I HAVE A BLACK AND WHITE VERSION AND DOES IT WORK WELL (GOOD TO HAVE A COLORED AND BLACK & WHITE VERSION OF YOUR LOGO'S)? | <input type="radio"/> _____ |
| <input type="radio"/> IS THE LOGO EASY TO READ AND UNDERSTAND?   | <input type="radio"/> _____ |
| <input type="radio"/> WILL MY LOGO WORK IN THUMBNAIL SIZE?   | <input type="radio"/> _____ |
| <input type="radio"/> DO I HAVE AN ALTERNATIVE LOGO?   | <input type="radio"/> _____ |
| <input type="radio"/> DO I HAVE A SUBMARK?   | <input type="radio"/> _____ |
| <input type="radio"/> ARE THE BALANCE AND PROPORTIONS CORRECT?   | <input type="radio"/> _____ |
| <input type="radio"/> IS IT FREE FROM VERY FINE DETAIL THAT WILL NOT BE SEEN IF IT IS TOO SMALL?   | <input type="radio"/> _____ |
| <input type="radio"/> WILL IT STILL BE APPROPRIATE IN 5 YEARS' TIME?   | <input type="radio"/> _____ |
| <input type="radio"/> DOES MY LOGO SET ME APART FROM MY COMPETITORS?   | <input type="radio"/> _____ |

NOTES: \_\_\_\_\_

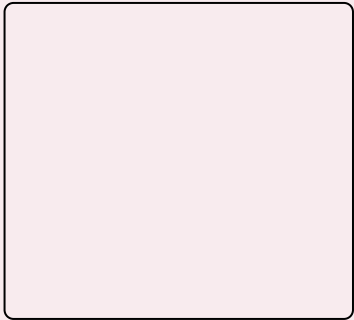
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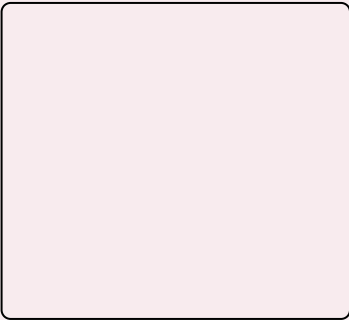
# BRAND BOARD

## LOGO

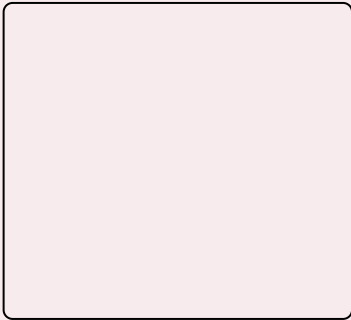
ALTERNATIVE LOGO



MAIN LOGO



SUB LOGO



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## FONTS

HEADING 1



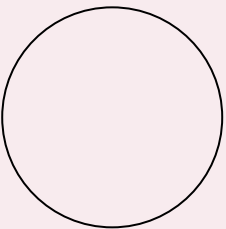
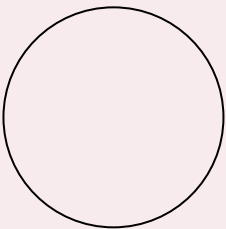
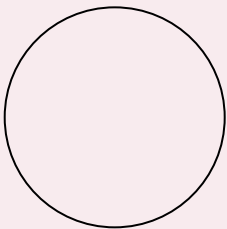
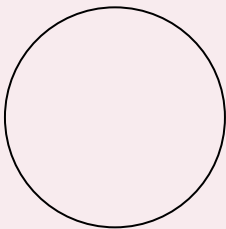
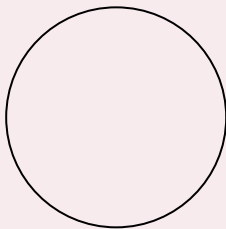
HEADING 2



BODY

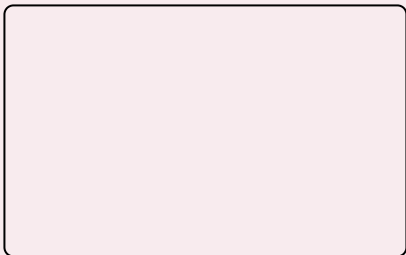
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## COLORS

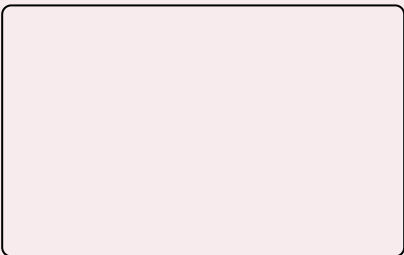


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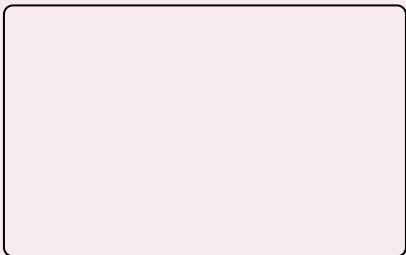
PATTERNS



SOCIAL MEDIA ICONS



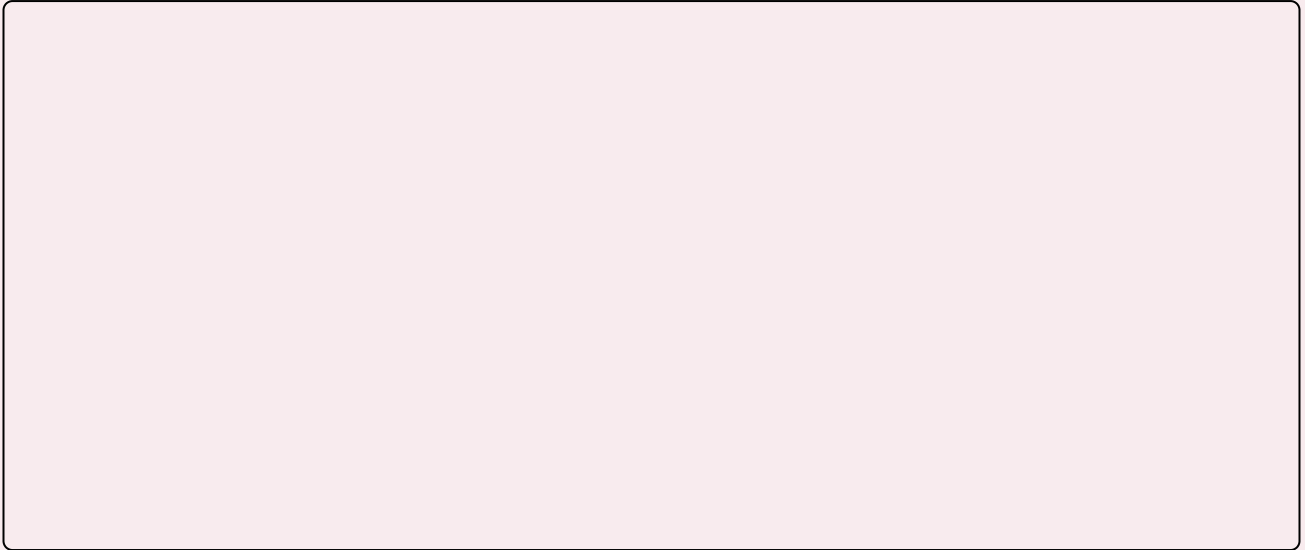
TEXTURES



# VISUALIZE YOUR SHOP

VISUALIZE WHAT YOUR SHOP WILL LOOK LIKE OVER HERE.

BANNER



SHOP NAME:

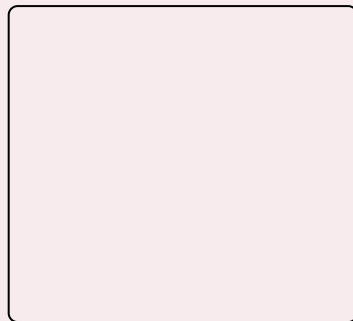
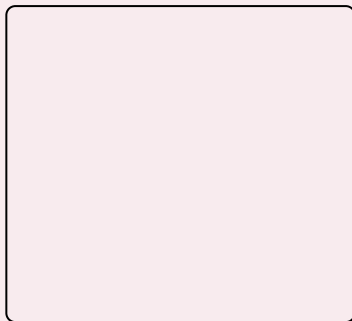
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SHOP TITLE:

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OWNER NAME & PICTURE

SHOP LOGO



SHOP ANNOUNCEMENT

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# SHOP OVERVIEW

WHY I CHOSE MY SHOP NAME

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VALUES OF MY SHOP

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MISSION STATEMENT

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TEAM MEMBERS

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OUR STRENGTHS

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FUTURE OPPORTUNITIES FOR MY BUSINESS

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# SHOP ANNOUNCEMENTS/DESCRIPTION

## ANNOUNCEMENT IDEAS

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## SHOP UPDATE IDEAS

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## ABOUT ME SECTION - SHOP DESCRIPTION

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# SHOP POLICIES

## SHIPPING & HANDLING

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## PROCESSING TIME

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## RETURNS & EXCHANGES

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## OTHER

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# FREQUENTLY ASKED QUESTIONS

QUESTION -

ANSWER -

QUESTION -

ANSWER -

QUESTION -

ANSWER -

QUESTION -

ANSWER -

A tall saguaro cactus stands prominently in the center of a desert landscape. The cactus has a single main column with two smaller arms branching out. The background features rolling desert hills and mountains under a cloudy sky. The foreground is sandy with sparse desert vegetation. The text "PRODUCTIVITY & GOALS" is overlaid in the center of the image.

# PRODUCTIVITY & GOALS

# START-UP TO-DO LIST

START DATE

END DATE

RESOURCES

CHALLENGES

STRATEGY

HIGH PRIORITY

LOW PRIORITY

- |                             |                             |
|-----------------------------|-----------------------------|
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |
| <input type="radio"/> _____ | <input type="radio"/> _____ |

NOTES

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# DAILY PLANNER

DATE:

M / T / W / TH / F / S / SU

## SCHEDULE

6:00
7:00
8:00
9:00
10:00
11:00
12:00
1:00
2:00
3:00
4:00
5:00
6:00
7:00
8:00
9:00

## TODAY'S FOCUS

## TOP PRIORITIES

## TO DO LIST

## NUTRITION & MOOD

BREAKFAST

LUNCH

DINNER

SNACK

water



Mood



POSITIVE THINGS

THINGS TO IMPROVE

NOTES

# WEEKLY PLANNER

WEEK OF:

SUNDAY

MONDAY

TUESDAY

## TOP PRIORITIES

TO DO

## SKILL/HABIT/CHORE TRACKER

[illegible]

## GRATITUDE

WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

NOTES



MONTH:

# MONTHLY PLANNER

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY


NOTES

TO DO LIST

# FOCUS PLANNER

START DATE

END DATE

MAIN FORCUS

HIGH PRIORITY

LOW PRIORITY

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

NOTES

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# TO-DO LIST

HIGH PRIORITY

LOW PRIORITY

[illegible]

# WEEKLY GOALS

WEEK 1

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

WEEK 2

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

WEEK 3

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

WEEK 4

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
-

# MONTHLY GOALS

JAN

STEPS TO TAKE

DEADLINE

ACHIEVED

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

FEB

STEPS TO TAKE

DEADLINE

ACHIEVED

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

MAR

STEPS TO TAKE

DEADLINE

ACHIEVED

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

APR

STEPS TO TAKE

DEADLINE

ACHIEVED

1.
- 
2.
- 
3.
- 
4.
- 
5.
-

# MONTHLY GOALS

MAY

DEADLINE  ACHIEVED ☐

STEPS TO TAKE

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

JUN

DEADLINE  ACHIEVED ☐

STEPS TO TAKE

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

JUL

DEADLINE  ACHIEVED ☐

STEPS TO TAKE

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

AUG

DEADLINE  ACHIEVED ☐

STEPS TO TAKE

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

# MONTHLY GOALS

SEPT

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

OCT

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

NOV

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
- 

DEC

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
- 
2.
- 
3.
- 
4.
- 
5.
-



# YEARLY GOALS

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

# SETTING GOALS

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.

2.

3.

4.

5.

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.

2.

3.

4.

5.

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.

2.

3.

4.

5.

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.

2.

3.

4.

5.

# S.M.A.R.T GOALS

## INSTRUCTIONS

SPECIFIC - IDENTIFY A SPECIFIC GOAL THAT IS DETAIL ORIENTATED

MEASURABLE - HOW WILL YOU MEASURE OR TRACK THE GOAL YOU'RE WORKING TOWARDS

ATTAINABLE - WHAT ACTIONS, SKILLS, AND RESOURCES WILL HELP YOU ACHIEVE THE GOAL

RELEVANT - HOW DOES THIS GOAL ALIGN WITH YOUR LONG-TERM GOALS AND ASPIRATIONS

TIME-ORIENTATED - WHAT IS THE TIME FRAME THAT YOU WANT TO COMPLETE THIS GOAL BY

SPECIFIC

MEASURABLE

ATTAINABLE

RELEVANT

TIME-ORIENTATED

# PRIORITY

## INSTRUCTIONS

LIST ALL THE TASKS YOU NEED TO GET DONE IN THE PRIORITY MATRIX BELOW. START WITH THE MOST IMPORTANT AND MOST URGENT. THE PRIORITY MATRIX WILL HELP YOU DETERMINE WHAT NEEDS TO GET DONE NOW AND HOW YOU CAN BETTER BALANCE ALL THE TASKS THAT YOU NEED TO DO.

DO NOW

DO LATER

IMPORTANT

GET IT DONE  
(Important & urgent)

SCHEDULE IT  
(Important - not urgent)

NOT IMPORTANT

DELEGATE IT  
(Who else can do it)

ELIMINATE IT  
(not important, not urgent - delete)

# MARKETING & SOCIAL MEDIA



MONTH:

# SOCIAL MEDIA CALENDAR

SUNDAY MONDAY TUESDAY WEDNESDAY THURSDAY FRIDAY SATURDAY


NOTES

TO DO LIST

# SOCIAL MEDIA-YEAR AT A GLANCE

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER



# SOCIAL MEDIA GOALS

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
2.
3.
4.
5.

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
2.
3.
4.
5.

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
2.
3.
4.
5.

GOAL

DEADLINE

ACHIEVED

STEPS TO TAKE

1.
2.
3.
4.
5.

# SOCIAL MEDIA

## SOCIAL MEDIA STRATEGY DETAILS

TRAFFIC SOURCE - HOW WILL YOU GET IN FRONT OF YOUR AUDIENCE? GO BACK TO YOUR IDEAL CLIENT AND THINK ABOUT WHICH PLATFORMS THEY WILL BE HANGING OUT ON.

- |  |  |
|--|--|
| <input type="checkbox"/> FACEBOOK PAGE   | <input type="checkbox"/> GOOGLE +        |
| <input type="checkbox"/> FACEBOOK ADS    | <input type="checkbox"/> OTHER PAID ADS: |
| <input type="checkbox"/> PINTEREST       | <input type="checkbox"/> PODCASTS        |
| <input type="checkbox"/> INSTAGRAM       | <input type="checkbox"/> INTERVIEWS      |
| <input type="checkbox"/> LINKEDIN        | <input type="checkbox"/> TELEVISION      |
| <input type="checkbox"/> FACEBOOK GROUPS | <input type="checkbox"/> EMAIL MARKETING |
| <input type="checkbox"/> YOUTUBE         | <input type="checkbox"/>                 |
| <input type="checkbox"/> GUEST POSTS     | <input type="checkbox"/>                 |
| <input type="checkbox"/> BLOG POSTS      | <input type="checkbox"/>                 |

HOW ARE YOU GOING TO BUILD TRUST. A RELATIONSHIP. AND PROVIDE THEM WITH VALUE?

- |   |  |
|---|--|
| <input type="checkbox"/> BLOG POSTS             | <input type="checkbox"/> IG LIVES        |
| <input type="checkbox"/> FACEBOOK POSTS         | <input type="checkbox"/> TWITTER UPDATES |
| <input type="checkbox"/> INSTAGRAM POSTS        | <input type="checkbox"/>                 |
| <input type="checkbox"/> FACEBOOK GROUP UPDATES | <input type="checkbox"/>                 |
| <input type="checkbox"/> WEEKLY NEWSLETTER      | <input type="checkbox"/>                 |
| <input type="checkbox"/> VALUE PODCAST          | <input type="checkbox"/>                 |
| <input type="checkbox"/> VIDEO                  | <input type="checkbox"/>                 |
| <input type="checkbox"/> IGTV                   | <input type="checkbox"/>                 |
| <input type="checkbox"/> FB LIVE                | <input type="checkbox"/>                 |

MAIN PLATFORMS:

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HOW MANY TIMES WILL I POST:

---

WHEN WILL I WRITE MY CONTENT:

---

IMAGES I WILL USE:

---

# SOCIAL MEDIA MARKETING PLAN

PRODUCT NAME:

DATE:

PLATFORM	IMAGE	CONTENT	POSTED
INSTAGRAM			
FACEBOOK			
IG STORIES			
FB STORIES			
TWITTER			
FB GROUPS			
PINTEREST			
EMAIL MARKETING			
BLOG POST			

PRODUCT NAME:

DATE:

PLATFORM	IMAGE	CONTENT	POSTED
INSTAGRAM			
FACEBOOK			
IG STORIES			
FB STORIES			
TWITTER			
FB GROUPS			
PINTEREST			
EMAIL MARKETING			
BLOG POST			

# SOCIAL MEDIA WEEKLY PLANNER

WEEK OF:

DAY	PLATFORM	POST	TIME	STATS
MON				
TUE				
WED				
THU				
FRI				
SAT				
SUN				

# POST PLANNER

POST TITLE:

TOPIC:

PLATFORMS:

PUBLISHED DATE:

DISCRIPTION

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HASHTAGS

LINKS TO INCLUDE

NOTES

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# POST CONTENT PLANNER

## INSTRUCTIONS

USE THIS AREA TO START COMPOSING YOUR POST

POST: \_\_\_\_\_

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

# ADS TRACKER

CAMPAIGN NAME:

START DATE:

END DATE:

RUN TIME:

DAILY BUDGET:

CHOSEN PRODUCTS FOR ADS

BUDGET SPENT:

TOTAL SALES:

TOTAL PROFIT:

ADDITIONAL NOTES:

CAMPAIGN NAME:

START DATE:

END DATE:

RUN TIME:

DAILY BUDGET:

CHOSEN PRODUCTS FOR ADS

BUDGET SPENT:

TOTAL SALES:

TOTAL PROFIT:

ADDITIONAL NOTES:

# PROMOTION TRACKER

PROMO NAME:

START DATE:

END DATE:

RUN TIME:

DISCOUNT AMOUNT:

PRODUCTS INCLUDED

TOTAL REVENUE:

TOTAL SALES:

TOTAL PROFIT:

ADDITIONAL NOTES:

PROMO NAME:

START DATE:

END DATE:

RUN TIME:

DISCOUNT AMOUNT:

PRODUCTS INCLUDED

TOTAL REVENUE:

TOTAL SALES:

TOTAL PROFIT:

ADDITIONAL NOTES:



# EMAIL PLANNER

CAMPAIGN NAME:

START DATE:

TIME:

TOPIC:

GOAL OF EMAIL

NOTES:

## TIPS WHEN CREATING YOUR EMAIL:

- EMAIL ADDRESSES READER BY NAME
- EMAIL IT FROM YOUR NAME NOT BUSINESS NAME
- WRITE AS IF YOU ARE SPEAKING TO ONE PERSON (IDEAL CLIENT) IN EMAIL
- SUBJECT LINE SPECIFIC, UNIQUE & EYE CATCHING
- EMAIL PROVIDES VALUE TO THE READER
- EMAIL SERVES A UNIQUE PURPOSE
- AT LEAST 2 CALL-TO-ACTIONS ARE INCLUDED
- CALL-TO-ACTION STANDS OUT AND IS EYE CATCHING
- EMAIL HAS LOGO AND BRANDING
- TELLS A STORY, HAS A START, MIDDLE AND ENDING
- EMAIL EASY TO READ, MAKE USE OF HEADINGS, PARAGRAPHS, FONT COMBINATION AND IMAGES
- READER CAN TAKE AWAY ONE PIECE OF VALUE
- TEST SEND EMAIL TO YOURSELF OR A FRIEND
- TEST THAT THE LINKS WORK
- CHECK FOR ANY OTHER ERRORS & SPELLING MISTAKES
- MAKE SURE EMAIL COPY IS IN YOUR BRAND VOICE

# EMAIL CONTENT PLANNER

## INSTRUCTIONS

USE THIS AREA TO START COMPOSING YOUR EMAIL

EMAIL: \_\_\_\_\_

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# PRODUCT PLANNING & BRAINSTORMING



# PRODUCT BRAINSTORM

PROBLEMS NEEDED TO BE SOLVED IN MY NICHE/INDUSTRY

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PRODUCTS THAT ARE THE SOLUTION TO THESE PROBLEMS

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COMPETITIVE ADVANTAGE OF THESE PRODUCTS

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# PRODUCT IDEAS

## NEEDS & WANTS OF CUSTOMERS

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WRITE DOWN 3 POTENTIAL PRODUCT SOLUTIONS TO THESE WANTS & NEEDS

ASK CURRENT CLIENTS FOR FEEDBACK ON THESE 3 PRODUCTS AND THEN CHOOSE THE BEST ONE - THIS IS TO VALIDATE YOUR PRODUCT IDEA.

PRODUCT 1

PRODUCT 2

PRODUCT 3

## POSSIBLE NAMES

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WHAT I NEED

WHAT I HAVE

# PROJECT PLANNER

TITLE: \_\_\_\_\_

START DATE

END DATE

RESOURCES

CHALLENGES

STRATEGY

GOAL: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ACTION STEP	COMPLETE BY	DATE COMPETE	NOTES

# PRODUCT

PRODUCT TITLE:

BUDGET:

TOTAL EXPENSES:

TOTAL PROFIT:

Launch Date

ACHIEVED

DESCRIPTION

CHECKLIST

KEYWORDS/SEO

MATERIALS NEEDED

EQUIPMENT NEEDED

# PRODUCT PRICING

## LABOUR

RATE PER HOUR:
HOURS SPENT:
TOTAL LABOR:

## MATERIALS

TOTAL COST OF PRODUCT MATERIALS:
PACKAGING MATERIALS TOTAL:
TOTAL MATERIALS COST:

## SHIPPING

DOMESTIC SHIPPING COSTS:
INTERNATIONAL SHIPPING COSTS:
INCLUDE IN PRICE?:

## TOTAL PRICE

MATERIALS:
LABOUR:
SHIPPING:
TOTAL:

## SELLING PRICE

TOTAL COST:	PROFIT:
WHOLESALE (COST X2):	
RETAIL (WHOLESALE X2):	
SELLING PRICE:	



# PRODUCT UNIQUE SELLING POINTS

WHAT ARE YOUR UNIQUE SELLING POINTS - EXPLAINED.

YOUR UNIQUE SELLING POINTS OR UNIQUE SELLING PROPOSITION ARE THE THINGS THAT SET YOUR PRODUCTS APART FROM THE COMPETITORS IN YOUR NICHE. IT'S THE VALUE OF WHAT YOU CAN ADD ON OR WHAT MAKES YOUR PRODUCT DIFFERENT. THESE ARE THE THINGS THAT MAKE YOUR BUSINESS AND THE PRODUCTS YOU MAKE DIFFERENT FROM EVERYONE ELSE IN THE MARKET

THE PRODUCT -

UNIQUE SELLING POINT 1:

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UNIQUE SELLING POINT 2:

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UNIQUE SELLING POINT 3:

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# HOLIDAY PLANNING

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

# HOLIDAY PRODUCT IDEAS

HOLIDAY:

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HOLIDAY:

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HOLIDAY:

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HOLIDAY:

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# PRODUCT EVALUATION-TOP SELLERS

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

TOP SELLERS

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REASONS WHY I THINK THEY WORKED

REASON 1

REASON 2

REASON 3

HOW CAN I USE THIS INFORMATION TO MAKE OTHER PRODUCTS BETTER?

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WHAT DO I WANT TO CHANGE/KEEP THE SAME?

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# PRODUCT EVALUATION-WORST SELLERS

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

WORST SELLERS

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REASONS WHY I THINK THEY DID NOT WORK

REASON 1

REASON 2

REASON 3

HOW CAN I IMPROVE THE PRODUCT?

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WHAT DO I WANT TO CHANGE/KEEP THE SAME?

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# FORMS & INVENTORY

# ORDER FORM

ORDER DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

ORDER NUMBER: \_\_\_\_\_

## CUSTOMER INFORMATION:

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

\_\_\_\_\_

EMAIL: \_\_\_\_\_

\_\_\_\_\_

## SHIPPING INFORMATION:

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## ORDER DETAILS:

ITEM	DESCRIPTION	QUANTITY	PRICE	AMOUNT

PAYMENT METHOD: \_\_\_\_\_

SHIPPING METHOD: \_\_\_\_\_

DATE SHIPPED: \_\_\_\_\_

TRACKING: \_\_\_\_\_

SUBTOTAL

DISCOUNT

TAX

SHIPPING

TOTAL

# INVOICE

ORDER DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

ORDER NUMBER: \_\_\_\_\_

BILLING INFORMATION:

NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

DATE DUE:

ORDER DETAILS:

ITEM	DESCRIPTION	QUANTITY	PRICE	AMOUNT

PAYMENT METHOD: \_\_\_\_\_

\_\_\_\_\_

DATE PAID: \_\_\_\_\_

SUBTOTAL	
DISCOUNT	
TAX	
SHIPPING	
TOTAL	



# RETURN FORM

ORDER DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

ORDER NUMBER: \_\_\_\_\_

## CUSTOMER INFORMATION:

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

\_\_\_\_\_

EMAIL: \_\_\_\_\_

\_\_\_\_\_

## REASON FOR RETURN

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## ORDER DETAILS:

ITEM	DESCRIPTION	QUANTITY	PRICE	AMOUNT
PAYMENT METHOD: _____			SUBTOTAL	
REFUND OR RETURN: _____			DISCOUNT	
REPLACEMENT DATE: _____			TAX	
REFUND DATE: _____			SHIPPING	
			TOTAL	

# LISTING TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# PRODUCT INVENTORY

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# PRODUCT MATERIALS INVENTORY

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# PACKAGING INVENTORY

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# MISCELLANEOUS INVENTORY

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# SUPPLIERS LIST

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# INVENTORY REORDER TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]



# ORDER TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# SHIPPING TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# DISCOUNT TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# RETURN TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# MY SHOP

## FINANCES



# FINANCE OVERVIEW

REFLECT ON YOUR INCOME & EXPENSES FOR THE YEAR.

MONTH	INCOME	EXPENSES	PROFITS
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			
JULY			
AUGUST			
SEPTEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			
TOTAL			

WHAT WERE THE BEST & WORST MONTHS AND POSSIBLE REASONS WHY?

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# MY FINANCE GOALS

## GOAL 1

DEADLINE

ACHIEVED

## STEPS TO TAKE

1.
2.
3.
4.
5.

## GOAL 2

DEADLINE

ACHIEVED

## STEPS TO TAKE

1.
2.
3.
4.
5.

## GOAL 3

DEADLINE

ACHIEVED

## STEPS TO TAKE

1.
2.
3.
4.
5.

## GOAL 4

DEADLINE

ACHIEVED

## STEPS TO TAKE

1.
2.
3.
4.
5.

# PASSWORD TRACKER

WEBSITE:
USERNAME:
PASSWORD:
NOTES:

WEBSITE:
USERNAME:
PASSWORD:
NOTES:

WEBSITE:
USERNAME:
PASSWORD:
NOTES:

WEBSITE:
USERNAME:
PASSWORD:
NOTES:

WEBSITE:
USERNAME:
PASSWORD:
NOTES:

WEBSITE:
USERNAME:
PASSWORD:
NOTES:

WEBSITE:
USERNAME:
PASSWORD:
NOTES:

WEBSITE:
USERNAME:
PASSWORD:
NOTES:



# INCOME TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# FIXED EXPENSE TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# VARIABLE EXPENSE TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# YEARLY SALES OVERVIEW

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

MONTH	SALES	RETURNS	PROFITS	LOSS
JANUARY				
FEBRUARY				
MARCH				
APRIL				
MAY				
JUNE				
JULY				
AUGUST				
SEPTEMBER				
OCTOBER				
NOVEMBER				
DECEMBER				
TOTAL				

WHAT WERE THE BEST & WORST MONTHS AND POSSIBLE REASONS WHY?

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## BILL DETAILS

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# TAX DEDUCTION TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# DONATION TRACKER

DATE: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

[illegible]

# MONTHLY FINANCE TRACKER

DATE: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

MONTHLY INCOME			
INCOME	PLANNED	ACTUAL	DIFFERENCE

MONTHLY EXPENSES			
DATE	DESCRIPTION	AMOUNT	PAID

MONTHLY BALANCE			
	ESTIMATED	ACTUAL	DIFFERENCE
INCOME			
EXPENSES			
TOTAL LEFT			