

FROM THE COACHING DESK OF DR. TINA FLORES

FOUNDER OF TFIH, LLC

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.tfhllc.com

You can also text me: 830-308-8344



A soft-focus photograph of a desert landscape. In the foreground, a cholla cactus (Cylindropuntia) is visible, characterized by its green, segmented, and spiny branches. In the background, a tall saguaro cactus (Cylindropuntia gigantea) stands prominently against a backdrop of rolling, hazy mountains under a bright, overcast sky. The overall tone is warm and natural, with a focus on the textures and colors of the desert flora.

BUSINESS STRATEGY

GETTING STARTED

DETERMINE YOUR VALUE

WHAT IS THE PURPOSE BEHIND YOUR BUSINESS

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

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

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

WHAT PROBLEM DO YOU SOLVE?

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

WHAT IS YOUR SOLUTION?

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

BRANDING CHECKLIST

BRANDING CHECKLIST

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

NOTES: _____

LOGO CHECKLIST

LOGO CHECKLIST

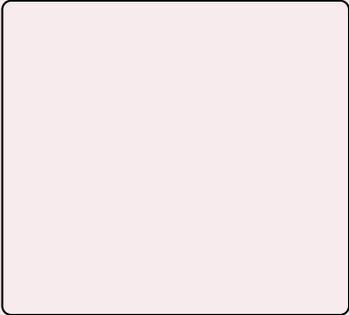
- DOES MY LOGO CLEARLY REPRESENT MY BRAND? _____
- DOES MY LOGO CONTAIN NO MORE THAN 3 COLORS & 3 FONTS? _____
- IS MY LOGO SIMPLE AND NOT TOO BUSY WITH TOO MUCH GOING ON? _____
- DO THE COLORS AND FONTS TARGET MY IDEAL CLIENT? _____
- IS MY LOGO IN VECTOR FORMAT (IT WILL NOT PIXELATE OR LOSE QUALITY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

NOTES: _____

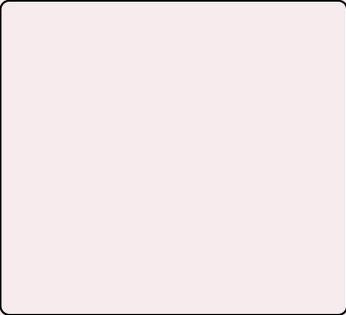
BRAND BOARD

LOGO

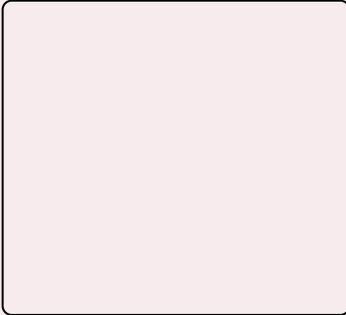
ALTERNATIVE LOGO



MAIN LOGO



SUB LOGO



FONTS

HEADING 1

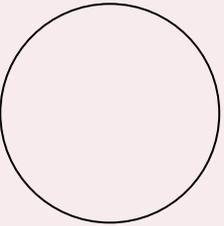
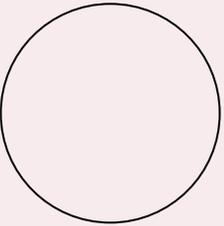
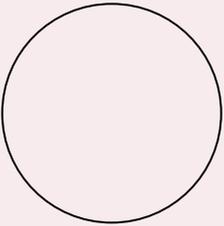
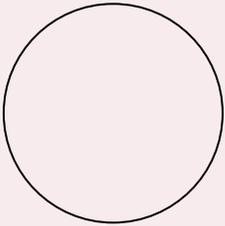
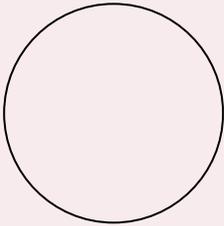


HEADING 2



BODY

COLORS



PATTERNS



SOCIAL MEDIA ICONS



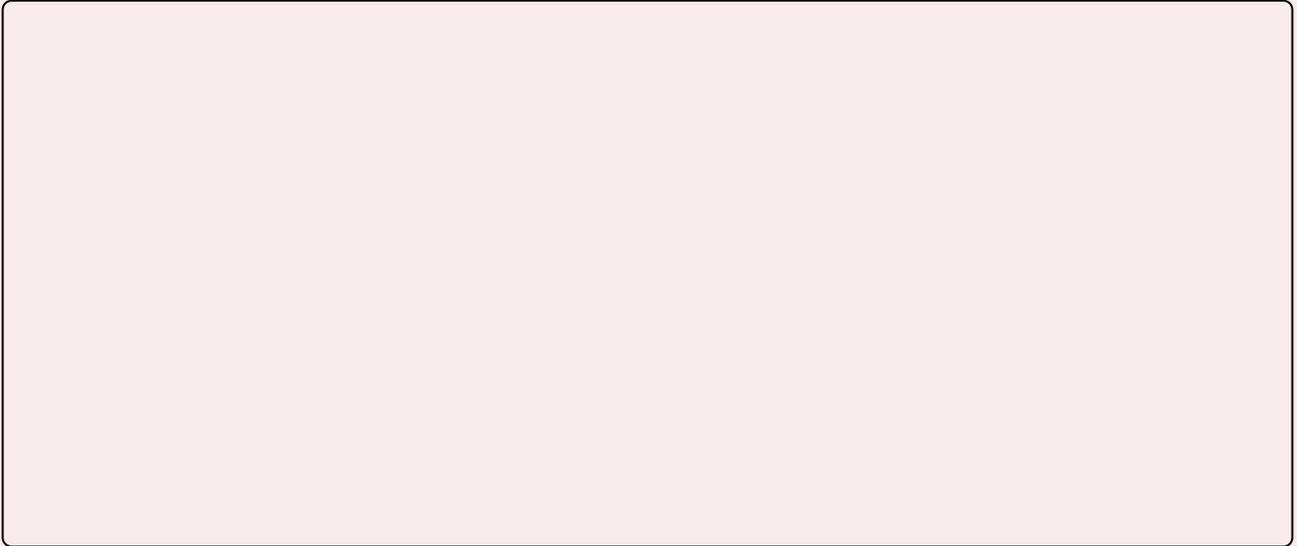
TEXTURES



VISUALIZE YOUR SHOP

VISUALIZE WHAT YOUR SHOP WILL LOOK LIKE OVER HERE.

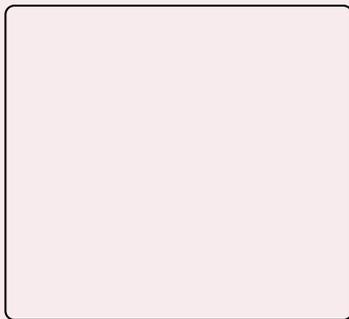
BANNER



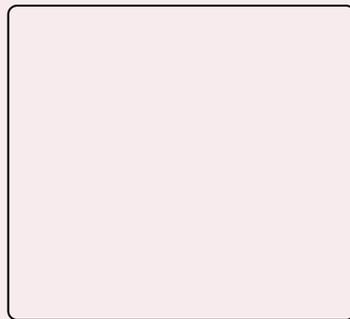
SHOP NAME:

SHOP TITLE:

OWNER NAME & PICTURE



SHOP LOGO



SHOP ANNOUNCEMENT

SHOP OVERVIEW

WHY I CHOSE MY SHOP NAME

VALUES OF MY SHOP

MISSION STATEMENT

TEAM MEMBERS

OUR STRENGTHS

FUTURE OPPORTUNITIES FOR MY BUSINESS

SHOP ANNOUNCEMENTS/DESCRIPTION

ANNOUNCEMENT IDEAS

SHOP UPDATE IDEAS

ABOUT ME SECTION - SHOP DESCRIPTION

SHOP POLICIES

SHIPPING & HANDLING

PROCESSING TIME

RETURNS & EXCHANGES

OTHER

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 main vertical stem and several smaller arms branching out. The background features a range of mountains under a cloudy sky. The foreground is a sandy desert floor with sparse, dry vegetation.

PRODUCTIVITY
& GOALS

START-UP TO-DO LIST

START DATE

END DATE

RESOURCES

CHALLENGES

STRATEGY

HIGH PRIORITY

LOW PRIORITY

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

NOTES

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

SUNDAY	MONDAY	TUESDAY

SKILL/HABIT/CHORE TRACKER

_____	<input type="checkbox"/>						
_____	<input type="checkbox"/>						
_____	<input type="checkbox"/>						
_____	<input type="checkbox"/>						
_____	<input type="checkbox"/>						

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 FOCUS

HIGH PRIORITY

LOW PRIORITY

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

NOTES

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

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

FEB

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

MAR

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

APR

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

MONTHLY GOALS

MAY

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

JUN

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

JUL

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

AUG

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

MONTHLY GOALS

SEPT

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

OCT

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

NOV

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

DEC

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE ACHIEVED

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:

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

HASHTAGS

LINKS TO INCLUDE

NOTES

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: _____

PRODUCT PLANNING & BRAINSTORMING



PRODUCT BRAINSTORM

PROBLEMS NEEDED TO BE SOLVED IN MY NICHE/INDUSTRY

PRODUCTS THAT ARE THE SOLUTION TO THESE PROBLEMS

COMPETITIVE ADVANTAGE OF THESE PRODUCTS

PRODUCT IDEAS

NEEDS & WANTS OF CUSTOMERS

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

WHAT I NEED

WHAT I HAVE

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:

UNIQUE SELLING POINT 2:

UNIQUE SELLING POINT 3:

HOLIDAY PLANNING

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

HOLIDAY PRODUCT IDEAS

HOLIDAY:

HOLIDAY:

HOLIDAY:

HOLIDAY:

PRODUCT EVALUATION-TOP SELLERS

DATE: ____ / ____ / ____

TOP SELLERS

REASONS WHY I THINK THEY WORKED

REASON 1

REASON 2

REASON 3

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

WHAT DO I WANT TO CHANGE/KEEP THE SAME?

PRODUCT EVALUATION-WORST SELLERS

DATE: ____ / ____ / ____

WORST SELLERS

REASONS WHY I THINK THEY DID NOT WORK

REASON 1

REASON 2

REASON 3

HOW CAN I IMPROVE THE PRODUCT?

WHAT DO I WANT TO CHANGE/KEEP THE SAME?

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: _____			SUBTOTAL	
SHIPPING METHOD: _____			DISCOUNT	
DATE SHIPPED: _____			TAX	
TRACKING: _____			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	

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?

MY FINANCE GOALS

GOAL 1

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE

ACHIEVED

GOAL 2

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE

ACHIEVED

GOAL 3

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE

ACHIEVED

GOAL 4

STEPS TO TAKE

1. _____
2. _____
3. _____
4. _____
5. _____

DEADLINE

ACHIEVED

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:

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?
