

SMALL BUSINESS

STARTUP GUIDE

A STEP-BY-STEP GUIDE TO BUILDING YOUR BUSINESS
FROM THE GROUND UP, AND A TRUSTED COMPANION
ON YOUR PATH TO SUCCESS.

welcome to your new beginning!

Congratulations on taking the first step towards turning your dreams into reality.

This planner is more than just a collection of pages—it's a blueprint for building your business from the ground up, and a companion on your journey to success.

Inside, you'll find everything you need to transform your ideas into a thriving enterprise.

Each section is meticulously designed to guide you through the various stages of business development, from inception to daily operations.

With this planner, you're not just planning for success—you're setting the stage for it.

Each page is designed to inspire and motivate you, reminding you that every big achievement begins with a single step.

Whether you're sketching out your next big idea or tracking the day-to-day details, this planner is here to help you keep everything aligned with your business goals.

*Dream big, plan well, and execute
with confidence.
Your entrepreneurial journey
starts now!*

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For easy navigating in the digital file, each line above is a link to the referred page. After printing the planner, the section tabs (last page) help you find what you need more easily.

getting
started



start-up checklist

PLANNING

- ☐ Choose a name
- ☐ Write a business plan
- ☐ Estimate start up costs
- ☐ Research target market + competition
- ☐ Decide on first products/services

BUSINESS

- ☐ Choose legal structure
- ☐ Register business name
- ☐ Apply for EIN (USA) or BN (CAN)
- ☐ Apply for permits and licenses
- ☐ Open a business banking account
- ☐ Set up accounting system
- ☐ Create order management system

MARKETING

- ☐ Create a marketing plan
- ☐ Buy domain name
- ☐ Apply to local events
- ☐ Set up a mailing list

BRANDING

- ☐ Design logo
- ☐ Choose brand colors
- ☐ Order business cards
- ☐ Launch website / hire web designer
- ☐ Develop product packaging
- ☐ Create a social media plan

PRODUCT DEVELOPMENT

- ☐ Set up a workspace
- ☐ Order supplies
- ☐ Develop prototypes
- ☐ Photograph products
- ☐ Write product descriptions
- ☐ Determine pricing

OTHER

- ☐ Create a marketing plan
- ☐ Buy domain name
- ☐ Apply to local events
- ☐ Set up a mailing list

one-page business plan

PROBLEM

What problem will my business help solve?

SOLUTION

How will my business help solve this problem?

BUSINESS MODEL

How will my business make money?

USP

What's my unique value proposition?
What will I do better than competitors?

PROMOTION

How will I reach my customers?

TARGET CUSTOMERS

What type of customers will I serve?

KEY METRICS

How will I measure success?

FINANCIAL PROJECTIONS

When do I expect to start making money?
How much each month?

opening my business

BUSINESS NAME IDEAS
1
2
3
4
5

BUSINESS DESCRIPTION

MAIN PRODUCTS/SERVICES
1
2
3
4
5

LICENSES & PERMITS
<input type="checkbox"/>
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LEGAL ENTITY

BANKING

NOTES

startup costs

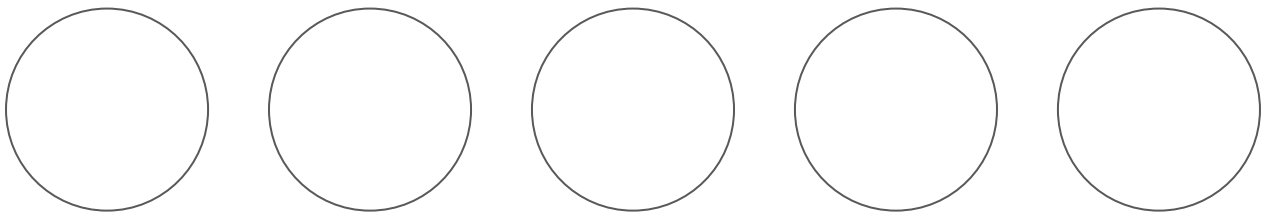
LICENSES/PERMITS	
WEBSITE DESIGN	
LOGO DESIGN	
EQUIPMENT	
RAW MATERIALS	
PACKAGING	
OFFICE/WAREHOUSE	
MANUFACTURING	
PAYROLL	
ADVERTISING	
INSURANCE	

brand board

OVERALL NOTES ON LOOK AND FEEL

PRIMARY LOGO	VARIANT LOGO1	VARIANT LOGO2

COLOR PALETTE



FONTS	PATTERNS	OTHER

notes on branding

FRIENDLY

WARM

INSPIRING

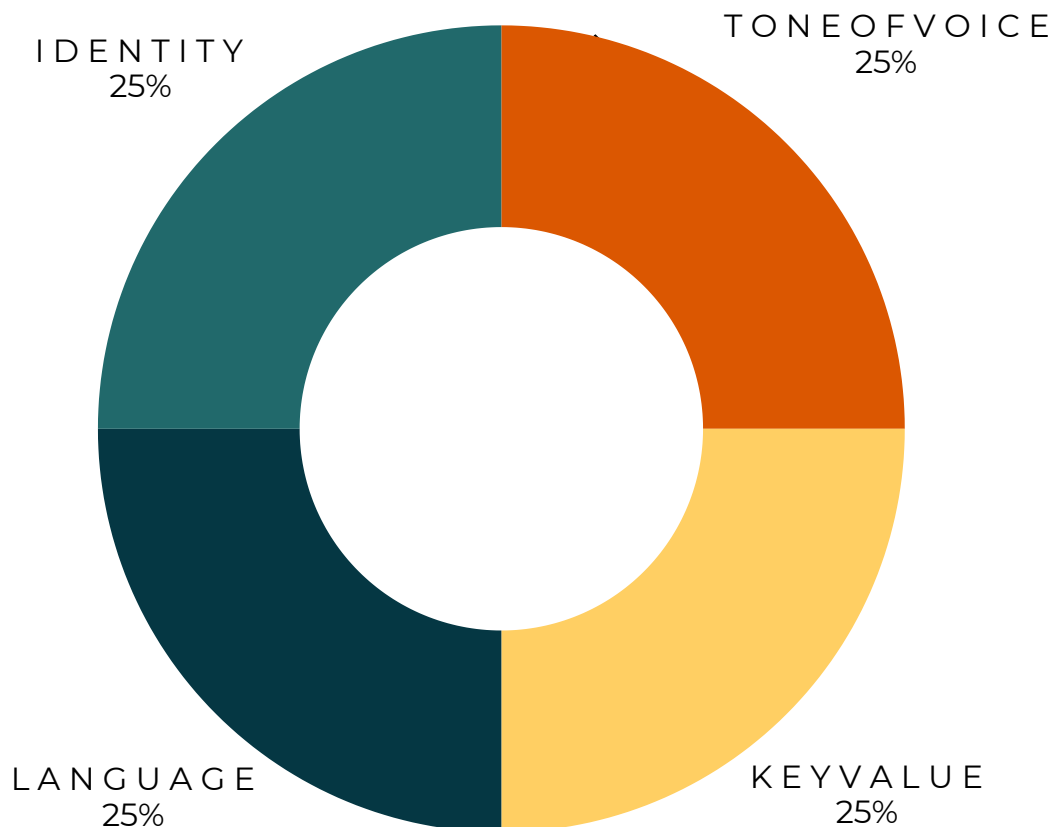
PROFESSIONAL

PERSONAL

ENTHUSIASTIC

SASSY

FORMAL



SIMPLE

FUN

SERIOUS

EMOTIONAL

QUALITY

AFFORDABLE

UNIQUE

CUSTOMER SERVICE

For each aspect, circle the characteristic that best applies to what you're aiming for.

goals planner

MYMAIN GOAL

SUB GOAL1	SUB GOAL2	SUB GOAL3

STEPS	STEPS	STEPS
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TARGET DATE	TARGET DATE	TARGET DATE
<div></div>	<div></div>	<div></div>

*forms, logs
& trackers*



time log

MONTH _____

[illegible]

order form

CUSTOMER

ORDER NO:

DATE:

DESCRIPTION	QTY	PRICE	TOTAL

PAYMENT INFORMATION

SUBTOTAL:

GST:

TOTAL:

NOTES

thank you!

invoice form

RECIPIENT

INVOICE NO:

ISSUE DATE:

DESCRIPTION	QTY	PRICE	TOTAL

PAYMENT INFORMATION

SUBTOTAL:

GST:

TOTAL:

NOTES

sales tracker

TIMEPERIOD _____

DATE	ITEM	REVENUE	FEES	PROFIT	SHIPPED

shipping tracker

TIMEPERIOD _____

DATE	SHIPPED TO	COST	TRACKING NO.	NOTES

returns tracker

TIMEPERIOD _____

DATE	CUSTOMER	ORDER NO.	TRACKING NO.	REASON	RE- CEIVED	RE- FUNDED

stock tracking

ITEM #	DESCRIPTION	QTY	LOCATION	LAST UPDATED

password tracker

WEBSITE	
USERNAME	
PASSWORD	
NOTES	

WEBSITE	
USERNAME	
PASSWORD	
NOTES	

WEBSITE	
USERNAME	
PASSWORD	
NOTES	

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NOTES	

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NOTES	

WEBSITE	
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NOTES	

WEBSITE	
USERNAME	
PASSWORD	
NOTES	

WEBSITE	
USERNAME	
PASSWORD	
NOTES	

new products to bring out

\$40



DIY GUIDE

\$24.95



THE VIRAL VIBE

\$170



MASTERCLASS

\$34.95



EBOOK + WORKBOOK

\$149



COLLECTION #1

\$199



COLLECTION #2

INSTRUCTIONS - REPLACE THE PICTURES AND PRICES WITH YOUR OWN PRODUCT IDEAS.

new products list

CATEGORY:
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seasonal ideas

JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

new product planner

NAME	TYPE	PRICE	DURATION	GOLIVE

DETAILED TO DO LIST
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TOP KEYWORDS
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INSPIRATION

NOTES

keyword worksheet

WHAT IS IT?
1
2
3

SYNONYMS
1
2
3

WHO IS IT FOR?
1
2
3

COLOR/MATERIAL/SIZE
1
2
3

SPECIAL FEATURES
1
2
3

OCCASION?
1
2
3

SEARCH PROMPTS
1
2
3

COMPETITOR KEYWORDS
1
2
3

pricing worksheet

MATERIAL	QTY	PRICE	TOTAL COST
TOTAL MATERIAL COST			

LABOR STEP	NROF HOURS	WAGE	TOTAL COST
TOTAL LABOR COST			

MATERIAL+LABORCOST	
RETAIL MARKUP %	%
RETAIL MARKUP AMOUNT	

COMPETITORS	
LOW PRICING	
MEDIUM PRICING	
HIGH PRICING	

TRANSACTION FEE	
OTHER FEES	
SALES TAX	
RETAILPRICE	

NOTES

SHIPPING COST	
RETAILPRICE INCLUDINGSHIPPING	

competitor analysis

COMPETITOR	PRODUCTS/ SERVICES	WHAT CAN I LEARN FROM THEM?	HOW CAN I DIFFERENTIATE MYSELF?

marketing planner



marketing planner

AUDIENCE		
TARGET PERSONA	CUSTOMER JOURNEY	VALUE PROPOSITION

STRATEGIES		
MARKETING GOALS	KEY STRATEGIES	CHANNELS

ACTIVITIES		
CONTENT CALENDAR	SOCIAL MEDIA	SEO

content monthly plan

PLATFORM: _____

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES

social media notes

BEST TIMES TO POST

	SUN	MON	TUE	WED	THU	FRI	SAT
FACEBOOK							
INSTAGRAM							
PINTEREST							
TIKTOK							
TWITTER							
YOUTUBE							

TOP HASHTAGS

NOTES

social media statistics

PLATFORM: _____

YEAR: _____

	AMOUNT OF FOLLOWERS	GROWTH SINCE LAST MONTH	NUMBER OF POSTS	TOP POSTS	NOTES
JAN					
FEB					
MAR					
APR					
MAY					
JUN					
JUL					
AUG					
SEP					
OCT					
NOV					
DEC					

social media followers

YEAR OF: _____

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
FACEBOOK												
INSTAGRAM												
PINTEREST												
TIKTOK												
TWITTER												
YOUTUBE												

KEY TAKEAWAYS
FACEBOOK
INSTAGRAM
PINTEREST
TIKTOK
TWITTER
YOUTUBE

NOTES

discounts & promos

COUPON	SALE	NAME	START DATE	END DATE	#OF ORDERS	REVENUE	NOTES

business finances



expenses log

TIME PERIOD _____

DATE	DESCRIPTION	CATEGORY	PURCHASED FROM	AMOUNT

income & expenses

MONTH _____

[illegible]

annual profit & loss

YEAR: _____

	SALES	MATERIALS	WAGES	FULFILLMENT	MARKETING	PLANT & EQUIPMENT	OTHER	PROFIT BEFORE TAXES
JAN								
FEB								
MAR								
APR								
MAY								
JUN								
JUL								
AUG								
SEP								
OCT								
NOV								
DEC								
TOTAL								

deductions log

YEAR _____

DATE	ITEM	CATEGORY	RECEIPT	VALUE

overview of potential deductions

HOME OFFICE

CONTRACTORS

EDUCATION

CAR

SUPERANNUATION

CONSULTANTS

BUSINESS INSURANCE

OFFICE SUPPLIES

LOAN INTEREST

PHONE AND INTERNET

BUSINESS TRAVEL+MEALS

START-UPCOSTS

ADVERTISING

MEMBERSHIPS

Please note that these tax deduction categories are suggestions. Confirm with your accountant what other tax deductions you may be eligible to claim.

*planning
the year*



yearly schedule

YEAR OF: _____

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

yearly schedule

YEAR OF: _____

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

yearly schedule

YEAR OF: _____

JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER



*planning
the months*

january

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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february

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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march

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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april

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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may

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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june

SUN	MON	TUE	WED	THU	FRI	SAT

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july

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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august

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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september

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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october

SUN	MON	TUE	WED	THU	FRI	SAT

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november

SUN	MON	TUE	WED	THU	FRI	SAT

NOTES		
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december

SUN	MON	TUE	WED	THU	FRI	SAT

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



*planning
the weeks*

weekly planner

WEEK OF: _____

MON					
TUE					
WED					
THU					
FRI					
SAT SUN					

TO DO
<input type="checkbox"/>
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<input type="checkbox"/>
<input type="checkbox"/>

NOTES

weekly + monthly

MONTH OF: _____

weekly

	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5
Check on bestselling product / service					
See how most recent projects					
Send out invoices					
Pay bills					
Read reviews and take action if needed					
Post on social media					

monthly

	Prioritize new project plans
	Double-check inventory
	In-depth review of stats
	Review goals
	Update product pages
	Learn a new skill

notes

--

weekly + monthly

MONTH OF: _____

weekly

	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5
Check on bestselling product / service					
See how most recent projects					
Send out invoices					
Pay bills					
Read reviews and take action if needed					
Post on social media					

monthly

	Prioritize new project plans
	Double-check inventory
	In-depth review of stats
	Review goals
	Update product pages
	Learn a new skill

notes

--

A close-up photograph of a sunflower field. The sunflowers have bright yellow petals and dark brown centers. The background is softly blurred, showing more sunflowers and a warm, golden light. The text "planning the days" is written in a white, elegant script font, centered over the image.

*planning
the days*

daily planner

DATE _____

TOP PRIORITIES

☐

☐

☐

TODAY'S WINS

1

2

3

SCHEDULE

TO DO

DON'T FORGET!

NOTES

priorities

	URGENT	NOT URGENT
VERY IMPORTANT	<input type="checkbox"/>	<input type="checkbox"/>
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LESS IMPORTANT	<input type="checkbox"/>	<input type="checkbox"/>
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meeting notes

TOPIC

DATE _____

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.

daily planner

DATE _____

TODAY'S GOALS	
1.	
2.	
3.	

TIMETABLE	
5 AM	
6 AM	
7 AM	
8 AM	
9 AM	
10 AM	
11 AM	
12 PM	

TIMETABLE	

TIMETABLE	
1 PM	
2 PM	
3 PM	
4 PM	
5 PM	
6 PM	
7 PM	
8 PM	
9 PM	
10 PM	
11 PM	
12 PM	

HEALS

section tabs

GETTING
STARTED

FORMS, LOGS
& TRACKERS

MARKETING
PLANNER

PLANNING
THE YEAR

MANAGING
MY PRODUCTS

PLANNING
THE WEEKS

PLANNING
THE DAYS

PLANNING
THE MONTHS

INSTRUCTIONS:
CUT OUT THE TABS, FOLD THEM IN HALF AND GLUE THEM TO THE
SECTION PAGES FOR EASIER NAVIGATING.

You've got this!

