Business Planner

BRANDING
PRODUCTIVITY
GOALS
PRODUCT PLAN
CUSTOMERS &
CLIENTS
FINANCES
SOCIAL MEDIA
BUSINESS FORMS



Business Plans

Business Overview

Business Name:	
Pusings Cool	Dueiness Teem
Business Goal	Business Team
Priof Description	
Brief Description:	
What products or services are you offering?	

Branding Questions

Basic Info	ormation	
Basic Information Business Name:		
Tagline:		
Short Description:		
Could you share the inspiration or	What makes your business unique?	
narrative behind your business name?		
	Where do you see your business in	
How did you get into your business?	1 year?	
	5 years?	
What value do you provide?		
	10 years?	

Brand Planning

Business Logo	Business Name
Busiliess Logo	Dusiness Name
	Jak Title
	Job Title
	Responsibilities
Vision	Mission
¥131011	1/11331011
	. <u> </u>
Tone —	Elevator Pitch
Toric	Lievator Fiteri
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Brand Planning

Tagline ————		
What Excites Me	Unique Value Proposition	
4 Words To Describe My Business	4 Words To Describe My Audience	
1.	1.	
2.	2.	
3.	3.	
4.	4.	
4 Words To Describe My Brand	Notes -	
1.		
2.		
3.		
4.		

Goal Planner

#1	#4
Goal:	Goal:
Deadline:	Deadline:
Reward:	Reward:
Purpose:	Purpose:
#2	#5
Goal:	Goal:
Deadline:	Deadline:
Reward:	Reward:
Purpose:	Purpose:
#3	#6
Goal:	Goal:
Deadline:	Deadline:
Reward:	Reward:
Purpose:	Purpose:

Goal Action Plan

	#1	-	#3
Goal:		Goal:	
Start Date:	Deadline:	Start Date:	Deadline:
Action Steps:		Action Steps:	,
O		_ _	
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Goal:	#2	Goal:	#4
Start Date:	Deadline:	Start Date:	Deadline:
Action Steps:		Action Steps:	
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		-)	
		\bigcup	

Long Term Goals

	What I Want To Achieve	Steps I Can Take
6		
Months		\bigcirc
		\bigcirc
	■ What I Want To Achieve ■	Steps I Can Take
	What Walle 10 / tellieve	
- 1		\bigcirc
Year		\bigcirc
		\bigcirc
	What I Want To Achieve	Steps I Can Take
		\bigcirc
5		0
Years		\bigcirc
		\bigcirc

Branding Checklist

Preparation ————	Print Materials
\bigcirc	
Visuals	Digital Materials
Implementation	Miscellaneous

Brand Board

Main Logo	Sub Logo	lcon
	Colors	
	Fonts	
	Image Inspiration	

Competitor Analysis

Factors	Competitor A	Competitor B

Frequently Asked Questions

FAQ #1	FAQ #4
Question:	Question:
Answer:	Answer:
FAQ #2	FAQ #5
Question:	Question:
Answer:	Answer:
FAQ #3	FAQ #6
Question:	Question:
Answer:	Answer:

Mission, Vision, Values

Mission:	
Mission	Values
	_
	_
	_
	_
	_
	_

Brand Adjectives

What are the 3 adjectives you'd use to describe your business?		
1.		
2.		
3.		
What are the 3 ad	jectives others would descri	be your business?
1	2	3
What is your business mot	to?	
,		

Core Concept

What we did to a continue of the in m?
What product or service are you offering?
Who is your ideal client?
Where and how can you reach your ideal clients?

Business Policies

Returns & Exchanges
Returns & Exchanges
Cancellations
Privacy & Policy
r iivacy & r oney
Terms & Conditions

Improvement Plan

Action #1	Results	
Action #2	Results	
Action #3	Results	
Action #4 ——	Results	



Productivity & Goals

Daily Planner

Date:	-	To-Do's
Priorities		
Agenda		Emails
7 AM		
8 AM		
9 AM		
10 AM		
11 AM		
12 PM		
1 PM		Calls
2 PM		
3 PM		
4 PM		
5 PM		
6 PM		
5 PM		

Weekly Planner

Week:	Monday
Priorities This Week	
	Tuesday
Projects This Week	Wednesday
	Thursday —
Scheduled Events	
	Friday ————————————————————————————————————
Deadlines	
	Weekend

Monthly Plan

— Mon —	— Tue —	— Wed —	— Thu		— F	ri —	— Sat		Sun	
	Top Priorit	ies		Ар	point	ments		_		_
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\bigcirc										
\bigcirc										
						D o	Not For	get =		
To-Do's			_	\bigcirc						
				\bigcirc						
				\bigcap						

To-Do Lists

	Phone Cal	ls ———	Meetings	
	Name	Phone #	Name	Time & Date
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$\overline{\bigcirc}$			\bigcirc	
			\bigcirc	
			\bigcirc	
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\bigcirc			\bigcirc	
			\bigcirc	
	Corresponde	inco —		
	•	TICE		
	Name	Email	Projects	
			Projects Description	Progress
<u>O</u>				
<u>O</u> O				
			Description	
			Description	

Weekly Goals

	Priorities Fo	r The Week	
\bigcirc			
	Goals For	The Week	
\bigcirc		\bigcirc	
Task	ks To Accomplish	т т	hings To Remember
\bigcirc			
\bigcirc			
\bigcirc			

Monthly Goals

Date:	Month:
Top Goals	Priorities This Month
Week 1	Week 3
	\bigcirc
Week 2	Week 4
	\bigcirc
	\bigcirc
	\bigcirc

Yearly Plan

January	July
January	July
	\bigcirc
February	August
	\bigcirc
Manala	Cantanahan
March ———	September
April —	October
	\bigcirc
May	November
iviay	November
June	December

Priority Planner

Proj	ect:	Date:
	Urgent	Not Urgent
	Do It Now	Decide When To Do It
ant	$\overline{\bigcirc}$	
Important		
<u>L</u>	\bigcirc	
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		<u> </u>
	Delegate	Do Later
ant	\bigcirc	
porta	$\frac{\bigcirc}{\bigcirc}$	
Not Important	\bigcirc	
Ž	<u>O</u>	
	\bigcirc	
Note	es ————	

Smart Goal

Initial Goal:	
	Expand Your Goal
	What do you want to achieve? Be precise.
S	
Specific	
	What will you know you've reached your goal?
M	
Measurable	
	Is this goal realistic?
A	
Attainable	
	How is this goal aligned with your overall mission or vision?
R	
Relevant	
	What do you want to accomplish this goal?
T	
Time-Bound	

Goal Setting Planner

				<u> </u>	1ain G	oal •						
—— Mini Go	all '		_	— M	ini Go	al 2		_	— M	ini Go	al3 •	
Action S	íteps		_	— Ac	tion S	teps	_	_	— Ac	tion S	Steps	_
Progress	J	F	М	A	M	J	J	A	S	0	N	D



Product Plans

Product Pricing Planner

	— Pro	duct	Details	_	_						
Product Nar	ne:										
Description:											
Tags:											to)
Model Name	9:					_					
SKU:											
		_	r	Mate	eria	ls Costs —	_	_	_		
Materia	ıls		Cost/Un	it		Unit Use	ed			Total C	ost
Lā	abor Co	sts =		ı ı			Ot	ther C	osts		
Production Cost	Rate F Hou		Total Cost			Description			st/ nit	Unit Used	Total Cost
			1	ı L] [
Total Cost: Desired Profit				t:		Produ	uct F	Price:			

Product Brainstorming

Product Category:			
Problem =			Solution
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$\overline{\bigcirc}$		\bigcirc	
Chosen Product:			
Why is it chosen?			
— Competitive Edge —	—— Forec	asting	Platform
— Competitive Lage —	Cost:	asting ——	Platioiiii ———
	Fees:		_
	Sale Price:		_
	Profit:		_
	Launch Dat	۵۰	_
	Ladireii Dat	.	

New Product Planner

Chosen Product:	
Why is it chosen?	
Wily is it chosen:	
Marke	eting —
Intended Audience	
Keywords	
Supplies	Needed
\bigcirc	Cost of Supplies:
	Fees/Taxes:
	Sale Price:
	Cost of Labor:
	Cost Per Item:
	Profit (Price-Cost)
Notes	

Product Inventory

— Date —	Product	 Description	Price	e Qty -

Product Pricing

Produ	Product #1				
Product Name:					
Labor Costs:	Material Costs:				
Packing Costs:	Shipping Costs:				
Marketing Costs:	Listing Costs:				
Other Costs:	Total Costs:				
Profit Amount:	Product Price:				
Notes:					
Produ	ıct #2				
Product Name:					
Labor Costs:	Material Costs:				
Packing Costs:	Shipping Costs:				
Marketing Costs:	Listing Costs:				
Other Costs:	Total Costs:				
Profit Amount:	Product Price:				
Notes:					

SWOT Analysis

Internal Origin (attributes of the organization)

Helpful to achieving the objective

Strengths

Harmful to achieving the objective

Weaknesses

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External Origin (attributes of the environment)

	Opportunities	
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\bigcirc		

	Threats	
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O		
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Product List

— ID# ——	Product Name	 Description	——— Unit Price	è –

The Project Planner

Project:								
Start Date:	E	nd Da	ite:					
Other Costs			_	_	- G	oals	_	
Tasks/Activities	Time	,	\bigcirc					
			\bigcirc					
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			\bigcirc					
			_		Mile	stone	.s –	
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			$\frac{\bigcirc}{\bigcirc}$				_	
			$\bigcup_{i=1}^{n}$					
			\bigcirc					
	Timelii	ne =						
Tasks/Activities		М	Т	W	Т	F	S	S

Coupons & Discounts

Date =	End Date	Code Name	■Discount ■	Used =	=Revenue =

Product Evaluation

Top Sellers	Qty =	Price	Why did it work?
Worst Sellers	= Qty =	Price	Why did it not work?
	<u> </u>		
Start Doing			Stop Doing

Brand Supplies

Product	– Qty –	Cost	Order Date	— Arrival —

Shipping Tracker

— Date —	Shipped To	Cost	Tracking #	Sent =
_				



Customer & Clients

Client Profile

	Client I	nfo	
Name:			
Address:			
Phone #:		Email:	
Notes:			
Date	Descrip	otion	Price —

Client Payments

Client:					
Address:		Pho	ne #:		
— Date —	Service		Amount	Fees =	Total

Customer Feedback

Product -	Feedback
Product Product	Feedback

Customer Receipt

No:	Date:
Received From:	
Amount:	\$
Payment For:	
Received By:	Signature:
No:	Date:
Received From:	
Amount:	\$
Payment For:	
Received By:	Signature:
No:	Date:
Received From:	
Amount:	\$
Payment For:	
Received By:	Signature:

Target Audience

	Name:		
	Age:		
(pic of target audience)	Gender:		
	Marital Status:		
	Children:		
General Interest	Educational Level:		
Ocheral Mecrese	Occupation:		
	Job Title:		
	Location:		
	Annual Income:		
Goals & Values	Sources of Information		
Problems & Challenges	Notes —		

Meeting Notes

Subject:
Attendees:



Finances

Annual Finance

	Financial Go	oals ——			Action Steps	
$\overline{\bigcirc}$						
$\overline{\bigcirc}$						
<u>O</u>						
0						
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	Inco	ome ——	Expe	enses =	P	rofit ———
	Goal	Actual	Goal	Actu	al Goal	Actual
January						
February						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						
		\\/\ba	le Year Overv	viovav =		
Target	Income	Ta	arget Expense	е	Differe	nce

Financial Goal Tracker

Goal	End Date			Progress ———				
			10%	20%	40%	60%	80%	100%

Annual Profit Tracker

Business Na	me:		Year:					
		Cumphy			Othor			
	Income	Income	Shipping •	Fees	Costs	Profit =		
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								
Total								

Income Tracker

Month:	Year:						
Description == Source == (\$) = Description == Source == (\$) =							
01	18						
02	19						
03	20						
04	21						
05	22						
06	23						
07	24						
08	25						
09	26						
10	27						
11	28						
12	29						
13	30						
14	31						
15	_						
16	Total (\$)						
17							

Spending Tracker

Date —	Description	Amount =	Payment	Method •
			Cash	Card

Cost Tracker

Material Cost								
Date	Material Subscription	Qty	Price					
	Subscription Cost							
Date	Description	# of Months	Price					
	Rent & Utilities Cost							
Date	Material Subscription	Qty	Price					

Profit Tracker

	Sales Profit							
Date	Item Purchased	Price	Fee	Profit				
	Net Reve	nue						
Material Cost	Subscription Cost	Utility Cost	Tot	al Cost				
Total Profit From	Total Profit From Sales:							
Net Revenue = Sales Profit - Cost:								

Debt Tracker

Debt Name:						Creditor:							
				– ма	ateria	al Cos	t —		_	_			
Starting Balance:						Minir	num l	Paym	ent:				
Interest Rate:						Goal	Montl	nly Re	payn	ner	nt:		
Due Date:						Goal	Payof	f Date):				
				= s	عادد	Profit							
Date		Amo	unt		Balar					Not	-AS		
Date		AITIO		'	Dalai				'	101	.63		
	_												
	J	F	M	A	М	J	J	A	5	5	0	N	D
Progress													

Expense Tracker

Sales Profit —							
Date	Description	Income	Outgoing				
		I					
Total Inco	ome Total Outgoings	Ва	alance ———				

Account Ledger

Start Balance: Month:							
	— Date —		Details		Income =	Expenses •	■ Balance =
01							
02							
03							
04							
05							
06							
07							
08							
09							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30							
31							

Purchase Tracker

Date	Product —	Supplier —	– Qty –	Price	— Tax =	Shipping =

Tax Deductions

Month:		Year	Year:			
— Date —	Description	Category	-Amount -	Receipt		

Investment Tracker

■ Date ■	Account Name	— Symbol —	— Qty —	Share_ Price	Fees -	Total Cost

Donation Tracker

— Date —	Donated To	Description	— Amount —

Bill Tracker

Bill —	■ Due On ■	Paid On	Amount	Next Due

Monthly Budget

Month:				Year:		
Income —	■Amount ■	Date =	Exp	oenses —	•• Amount •	Date =
			-) o lo t o	A ma a cumb	Dete
				epts ===	-Amount -	■ Date ■
— Bills —	■Amount ■	■ Date ■				
			Sa Sa	vings —	-Amount	Date =

Order Tracker

Date Order #	Product ——	— Qty —	Price =	Fees =	■ Tota
				Total:	

Sales Tracker

Date Order #	Product —	— Qty —	Price =	Fees =	T ota
				Total:	

Weekly Expenses

— Date —	Description	Amount	Notes —
	Total:		

Monthly Expenses

— Date —	Description	Amount	Notes —
	Total:		



Social Media & Marketing

Social Media Planner

	Platform	Post —	Tags —	Time	Stats
M					
т					
W					
т					
F			-		
S					
S					

Posting Planner

Platform:		Date:
Time:		Schedule: Yes No
P 6		Doct Image
Post C	aption ————	Post Image
		-
		-
Hash	ntags ————	Call To Action
		-
		-
Post Results		Notes
Likes:	Reach:	
Saves:	Impression:	
Interactions:		
Comments:		

Social Media Tracker

Date INSTAGRAM Followers **Avg Post Comments Stories View Profile Visits FACEBOOK Followers** Post Engagements **PINTEREST Followers Monthly Viewers EMAIL** Subscribers Avg Open Rate Avg Click Rate Conversons YOUTUBE **Followers** Views **Avg View Duration TWITTER Followers Impressions Link Clicks**

Marketing Cost

Month:			Year:	
		_		
— Social Media Account —	■ Total Spent ■	_	Profit / Loss =	Result -

Monthly Calendar

Month:			Year:	
Facebook	Olnstagram	Pinterest	Youtube	Tiktok
<u> </u>	<u></u>	<u></u>	<u> </u>	<u></u>
<u> </u>	7	8	9	<u> </u>
<u></u> 11	<u> </u>	<u> </u>	<u> </u>	<u>15</u>
<u> </u>	<u></u>	<u> </u>	<u> </u>	
<u> </u>	<u></u>	<u></u>	<u></u>	25
		28		<u> </u>
				<u></u>

Monthly Review

Month:						Ye	ar:	
Goa	als Achieved		II		_	_	Month's Posts	s ——
\bigcirc				Date			Post	
\bigcirc								
0					+			
\bigcirc			,					
<u> </u>					1			
<u> </u>								
\bigcirc					+			
\bigcirc			,		\dagger			
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		Social Med	dia I	Finances		Ξ		
Ad Cost	Affiliate	Sponsored		Income	è		Expenses	Other
		Social M	ledi	a Stats				
Facebook	Instagram	Pinterest		Youtube	е		Tiktok	Twitter

Social Media Daily

Facebook	Youtube
	\bigcirc
	\bigcirc
Instagram	Tiktok —
	\bigcirc
	\bigcirc
	<u> </u>
Pinterest	Twitter
\sim	
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Social Media Accounts

Facebook	Vantula
Facebook	Youtube
Username:	Username:
Password:	Password:
Website:	Website:
Bio:	Bio:
Keywords:	Keywords:
Instagram	Tiktok
Username:	Username:
Password:	Password:
Website:	Website:
Bio:	Bio:
Keywords:	Keywords:
Pinterest	Twitter
Username:	Username:
Password:	Password:
Website:	Website:
Bio:	Bio:
Keywords:	Keywords:

Content Plan

Content Type:		
Platform:	Category:	
Date:	Title:	
Keywords:		
Main Content	Image &	Graphics ———
Preparation	Main C	Content
	——— Main C	Content ———
	Likes:	Reactions:
	Comments:	Clicks:

Social Media Goals

Daily	Weekly
Bully	vveekiy
	·
Monthly —	Quarterly
Ar	nnually ———————————————————————————————————

Monthly Performance

Platform:		Month:	
——— Annually ———		■ Weekly F	-ollowers -
, amoung	Week 1:		Week 3:
	Week 2:		Week 4:
	Total Fo	llowers:	
Top Performing Posts		Vorst Perfo	rming Posts
	\bigcirc		
	$\overline{\bigcirc}$		
<u> </u>			
What images your audience liked the mo	st? ——		
What your audience want to see again?			
What your audience engages with?			
wriat your addictive eligages with:			

Social Media Competitors

Analyze	Competitor 1	Competitor 2	Competitor 3
Competitor Identification			
Social Media Platforms			
Follower Analysis			
Content Strategy			
Posting Frequency & Timing			
Engagement Metrics			
Popular Hashtags			
Popular Keywords			
Sponsored Content			
Influencer Collaborations			
Customer Feedback			
Social Media Tools in Use			
Emerging Trends			
Strengths			
Weaknesses			

Stats By Month

Social Media	a Platform:		
Month	Average Reach	Total Likes	Followers -
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			
Notes —			

Social Media Checklist

Social Media Platform:	
Social Media Flationni.	
Daily —	
Weekly	
• • • • • • • • • • • • • • • • • • •	
O	
Monthly	
\bigcirc	\bigcirc
Annually	
Allitually	_
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Hashtag Research

Topic:		Topic:		
Hashtag	Reach	Hashtag	Reach	
		Tonio		
		Topic:	D	
Topic:		Topic: Hashtag	Reach	
Topic:	Reach		Reach	
	Reach		Reach	

Campaign Manager

Campaign Name:	
Description	Campaign Aim:
	Launch Date:
	Platform:
	Budget:
	Actual Spend:
Campaign Result:	Successful? Yes No
Notes	
Г	
Campaign Name:	
Description	Campaign Aim:
	Launch Date:
	Platform:
	Budget:
	Actual Spend:
Campaign Result:	Successful? Yes No
Notes	

Marketing Strategy

Droduct	Drice
Product	Price
Advertising	Place
	-
A Grand Calles Consisted	
After Sales Services	Warranties
	-
	-

Advertising Plan

	Goal	
	Goal	
Awareness	Sales	Feedbacks
Targeting Area	Т	argeting Customer
	Budget	
Daily / Monthly	1	Bid

Follower Growth

— Month —	— Start —	— End —	— Growth —	– Target –	Difference =
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					
Notes					

Seasonal Promotion

January	February	March
April	May	June
July	August	September
October	November	December

Keyword Planner

Keyword:
Competition:
Monthly Searches:
Related Searches:
Keyword:
Competition:
Monthly Searches:
Related Searches:
Keyword:
Competition:
Monthly Searches:
Related Searches:



Business Forms

Supplier Contact List

Name:	Website:
Phone:	Min Order:
Email	Products:
Notes:	
Name:	Website:
Phone:	Min Order:
Email	Products:
Notes:	
Name:	Website:
Phone:	Min Order:
Email	Products:
Notes:	

Order Form

		Customer Information	ation =	_		
Name: Phone:			ne:			
Email: Address:		ress:				
		·				
		Order Details				
Qty	Item	Description	\$		Offer	Total
Payment Method:				Sul	ototal:	
Shipping Method:				Dis	count:	
Date Shipped:				Tax	(:	
Tracking Number:				Shipping:		
				Tot	·al	

Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	

Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	

Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	

Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	
Name:	Website:
Phone:	Address:
Email:	Business:
Notes:	

Bank Accounts

Account Name:	Account Type:			
Bank Name:	Routing Number:			
Account Number:	Pin Number:			
Username:	Password:			
Address:				
Note:				
Account Name:	Account Type:			
Bank Name:	Routing Number:			
Account Number:	Pin Number:			
Username:	Password:			
Address:				
Note:				
Account Name:	Account Type:			
Bank Name:	Routing Number:			
Account Number:	Pin Number:			
Username:	Password:			
Address:				
Note:				

Password List

#1		#2
#1		#2
Website:	Website:	
Username:	Username:	
Password:	Password:	
Email:	Email:	
Note:	Note:	
#3		#4
Website:	Website:	
Username:	Username:	
Password:	Password:	
Email:	Email:	
Note:	Note:	
#5		#6
Website:	Website:	
Username:	Username:	
Password:	Password:	
Email:	Email:	
Note:	Note:	

Invoice Form

Website:									
Username:									
Password:									
Email:									
Note:									
Item Description		Qt	v		Р	rice —		Total	
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Sub-Total:	Ta	X:				Гotal:			

Return Form

Customer Name:		Date:					
Telephone:		Order #:					
Email:		Address:					
Return Authorization Number:							
Item #	Product	Qty	Reason For Return				
Notes							