

Business Planner

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

Name:



Business Plans

Business Overview

Business Name:

Business Goal

Business Team

Brief Description:

What products or services are you offering?

Branding Questions

Basic Information

Business Name:

Tagline:

Short Description:

Could you share the inspiration or narrative behind your business name?

What makes your business unique?

How did you get into your business?

Where do you see your business in

1 year?

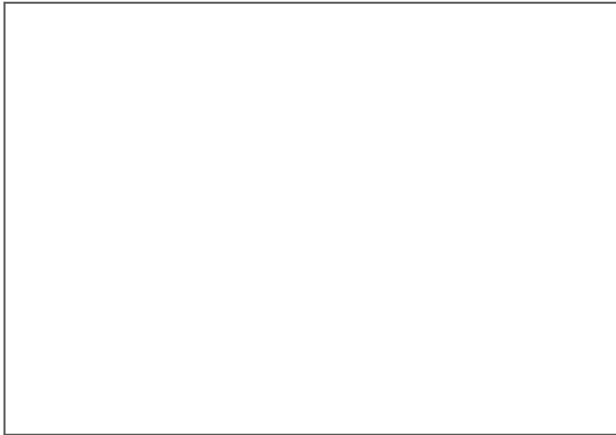
What value do you provide?

5 years?

10 years?

Brand Planning

Business Logo



Business Name

Job Title

Responsibilities

Vision

Mission

Tone

Elevator Pitch

Brand Planning

Tagline

What Excites Me

Unique Value Proposition

4 Words To Describe My Business

1.

2.

3.

4.

4 Words To Describe My Audience

1.

2.

3.

4.

4 Words To Describe My Brand

1.

2.

3.

4.

Notes

Goal Planner

#1

Goal:

Deadline:

Reward:

Purpose:

#4

Goal:

Deadline:

Reward:

Purpose:

#2

Goal:

Deadline:

Reward:

Purpose:

#5

Goal:

Deadline:

Reward:

Purpose:

#3

Goal:

Deadline:

Reward:

Purpose:

#6

Goal:

Deadline:

Reward:

Purpose:

Goal Action Plan

#1

Goal:

Start Date:

Deadline:

Action Steps:

-
-
-
-
-

#3

Goal:

Start Date:

Deadline:

Action Steps:

-
-
-
-
-

#2

Goal:

Start Date:

Deadline:

Action Steps:

-
-
-
-
-

#4

Goal:

Start Date:

Deadline:

Action Steps:

-
-
-
-
-

Long Term Goals

6

Months

What I Want To Achieve

Steps I Can Take

1

Year

What I Want To Achieve

Steps I Can Take

5

Years

What I Want To Achieve

Steps I Can Take

Branding Checklist

Preparation

- _____
- _____
- _____
- _____
- _____

Print Materials

- _____
- _____
- _____
- _____
- _____

Visuals

- _____
- _____
- _____
- _____
- _____

Digital Materials

- _____
- _____
- _____
- _____
- _____

Implementation

- _____
- _____
- _____
- _____
- _____

Miscellaneous

- _____
- _____
- _____
- _____
- _____

Brand Board

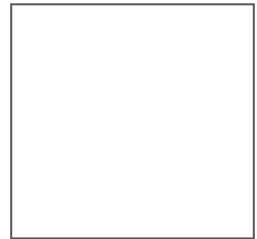
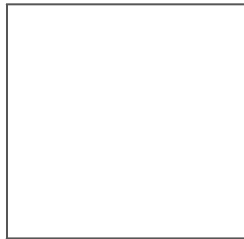
Main Logo

Sub Logo

Icon



Colors



Fonts



Image Inspiration



Frequently Asked Questions

FAQ #1

Question:

Answer:

FAQ #2

Question:

Answer:

FAQ #3

Question:

Answer:

FAQ #4

Question:

Answer:

FAQ #5

Question:

Answer:

FAQ #6

Question:

Answer:

Brand Adjectives

What are the 3 adjectives you'd use to describe your business?

1.

2.

3.

What are the 3 adjectives others would describe your business?

1

2

3

What is your business motto?

Core Concept

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



Cancellations



Privacy & Policy



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

7 AM

8 AM

9 AM

10 AM

11 AM

12 PM

1 PM

2 PM

3 PM

4 PM

5 PM

6 PM

Emails

Calls

Weekly Planner

Week:

Priorities This Week

Projects This Week

Scheduled Events

Deadlines

Monday

Tuesday

Wednesday

Thursday

Friday

Weekend

Monthly Plan

— Mon — Tue — Wed — Thu — Fri — Sat — Sun —

Top Priorities

- _____
- _____
- _____

To-Do's

- _____
- _____

Appointments

- _____
- _____

Do Not Forget

- _____
- _____
- _____

Weekly Goals

Priorities For The Week

Goals For The Week

Tasks To Accomplish

Things To Remember

Monthly Goals

Date:

Month:

Top Goals

Priorities This Month

Week 1

Week 3

Week 2

Week 4

Yearly Plan

January

February

March

April

May

June

July

August

September

October

November

December

Priority Planner

Project:

Date:

Urgent

Not Urgent

Do It Now

Decide When To Do It

Important

Delegate

Do Later

Not Important

Notes

Smart Goal

Initial Goal:

Expand Your Goal

S

What do you want to achieve? Be precise.

Specific

M

What will you know you've reached your goal?

Measurable

A

Is this goal realistic?

Attainable

R

How is this goal aligned with your overall mission or vision?

Relevant

T

What do you want to accomplish this goal?

Time-Bound



Product Plans

Product Pricing Planner

Product Details

Product Name:

Description:

Tags:

Model Name:

SKU:

(product photo)

Materials Costs

Materials	Cost/Unit	Unit Used	Total Cost

Labor Costs

Production Cost	Rate Per Hour	Total Cost

Other Costs

Description	Cost/Unit	Unit Used	Total Cost

Total Cost:

Desired Profit:

Product Price:

Product Brainstorming

Product Category:

Problem

Solution

Chosen Product:

Why is it chosen?

Competitive Edge

Forecasting

Platform

Cost:

Fees:

Sale Price:

Profit:

Launch Date:

New Product Planner

Chosen Product:

Why is it chosen?

Marketing

Intended Audience

Keywords

Supplies Needed

Cost of Supplies:

Fees/Taxes:

Sale Price:

Cost of Labor:

Cost Per Item:

Profit (Price-Cost)

Notes

Product Pricing

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:

Product #2

Product Name:

Labor Costs:

Material Costs:

Packing Costs:

Shipping Costs:

Marketing Costs:

Listing Costs:

Other Costs:

Total Costs:

Profit Amount:

Product Price:

Notes:

The Project Planner

Project:

Start Date:

End Date:

Other Costs

Tasks/Activities	Time

Goals

Milestones

Timeline

Tasks/Activities	M	T	W	T	F	S	S

Product Evaluation

Top Sellers Qty Price Why did it work?

Top Sellers	Qty	Price	Why did it work?

Worst Sellers Qty Price Why did it not work?

Worst Sellers	Qty	Price	Why did it not work?

Start Doing

Stop Doing



Customer & Clients

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

(pic of target audience)

Name:

Age:

Gender:

Marital Status:

Children:

Educational Level:

Occupation:

Job Title:

Location:

Annual Income:

General Interest

Goals & Values

Sources of Information

Problems & Challenges

Notes



Finances

Annual Finance

Financial Goals	Action Steps
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

	Income		Expenses		Profit	
	Goal	Actual	Goal	Actual	Goal	Actual
January						
February						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						

Whole Year Overview		
Target Income	Target Expense	Difference

Annual Profit Tracker

Business Name:

Year:

Income Supply Income Shipping Fees Other Costs Profit

	Income	Supply Income	Shipping	Fees	Other Costs	Profit
January						
February						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						

Total

--	--	--	--	--	--	--

Income Tracker

Month:

Year:

— Description — Source — (\$) —

01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			
12			
13			
14			
15			
16			
17			

— Description — Source — (\$) —

18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			
30			
31			

— Total (\$) —

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 Revenue

Material Cost	Subscription Cost	Utility Cost	Total Cost

Total Profit From Sales:

Net Revenue = Sales Profit - Cost:

Expense Tracker

Sales Profit

Date	Description	Income	Outgoing

Total Income

Total Outgoings

Balance

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					

Order Tracker

■ Date ■ Order # ■ Product ■ Qty ■ Price ■ Fees ■ Total ■

					Total:	

Sales Tracker

■ Date ■ Order # ■ Product ■ Qty ■ Price ■ Fees ■ Total ■

Date	Order #	Product	Qty	Price	Fees	Total
Total:						



Social Media & Marketing

Social Media Planner

	Platform	Post	Tags	Time	Stats
M					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
T					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
W					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
T					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
F					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
S					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
S					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Posting Planner

Platform:

Date:

Time:

Schedule: Yes No

Post Caption

Post Image

Hashtags

Call To Action

Post Results

Notes

Likes:

Reach:

Saves:

Impression:

Interactions:

Comments:

Social Media Tracker

1st Day 1st Mo 3rd Mos 6th Mos 9 Mos 12 Mos

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						
Conversions						
YOUTUBE						
Followers						
Views						
Avg View Duration						
TWITTER						
Followers						
Impressions						
Link Clicks						

Monthly Calendar

Month:

Year:

Facebook

Instagram

Pinterest

Youtube

Tiktok

<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
<input type="radio"/> 6	<input type="radio"/> 7	<input type="radio"/> 8	<input type="radio"/> 9	<input type="radio"/> 10
<input type="radio"/> 11	<input type="radio"/> 12	<input type="radio"/> 13	<input type="radio"/> 14	<input type="radio"/> 15
<input type="radio"/> 16	<input type="radio"/> 17	<input type="radio"/> 18	<input type="radio"/> 19	<input type="radio"/> 20
<input type="radio"/> 21	<input type="radio"/> 22	<input type="radio"/> 23	<input type="radio"/> 24	<input type="radio"/> 25
<input type="radio"/> 26	<input type="radio"/> 27	<input type="radio"/> 28	<input type="radio"/> 29	<input type="radio"/> 30
				<input type="radio"/> 31

Monthly Review

Month:

Year:

Goals Achieved

-
-
-
-
-
-
-
-
-
-

Month's Posts

Date	Post

Social Media Finances

Ad Cost	Affiliate	Sponsored	Income	Expenses	Other

Social Media Stats

Facebook	Instagram	Pinterest	Youtube	Tiktok	Twitter

Social Media Daily

Facebook

Youtube

Instagram

Tiktok

Pinterest

Twitter

Social Media Accounts

Facebook

Username:

Password:

Website:

Bio:

Keywords:

Youtube

Username:

Password:

Website:

Bio:

Keywords:

Instagram

Username:

Password:

Website:

Bio:

Keywords:

Tiktok

Username:

Password:

Website:

Bio:

Keywords:

Pinterest

Username:

Password:

Website:

Bio:

Keywords:

Twitter

Username:

Password:

Website:

Bio:

Keywords:

Content Plan

Content Type:

Platform:

Category:

Date:

Title:

Keywords:

Main Content

Preparation

Image & Graphics

Main Content

Main Content

Likes:	Reactions:
Comments:	Clicks:

Social Media Goals

Daily

Weekly

Monthly

Quarterly

Annually

Monthly Performance

Platform:

Month:

Annually

Weekly Followers

Week 1:	Week 3:
Week 2:	Week 4:
Total Followers:	

Top Performing Posts

Worst Performing Posts

What images your audience liked the most?

What your audience want to see again?

What your audience engages 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 Platform:

Month Average Reach Total Likes Followers

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:

Daily

Weekly

Monthly

Annually

Campaign Manager

Campaign Name:

Description

Campaign Aim:

Launch Date:

Platform:

Budget:

Actual Spend:

Campaign Result:

Successful?

Yes

No

Notes

Campaign Name:

Description

Campaign Aim:

Launch Date:

Platform:

Budget:

Actual Spend:

Campaign Result:

Successful?

Yes

No

Notes

Marketing Strategy

Product

Price

Advertising

Place

After Sales Services

Warranties

Advertising Plan

Goal

Awareness

Sales

Feedbacks

Targeting Area

Targeting Customer

Budget

Daily / Monthly

Bid

Follower Growth

Month Start End Growth Target Difference

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

Name:

Phone:

Email:

Address:

Order Details

Qty	Item	Description	\$	Offer	Total

Payment Method:

Shipping Method:

Date Shipped:

Tracking Number:

Subtotal:

Discount:

Tax:

Shipping:

Total

Contact List

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

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

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

Contact List

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

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

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

Contact List

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

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

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

Contact List

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

Website:

Username:

Password:

Email:

Note:

#2

Website:

Username:

Password:

Email:

Note:

#3

Website:

Username:

Password:

Email:

Note:

#4

Website:

Username:

Password:

Email:

Note:

#5

Website:

Username:

Password:

Email:

Note:

#6

Website:

Username:

Password:

Email:

Note:

Invoice Form

Website:	
Username:	
Password:	
Email:	
Note:	

Item Description	Qty	Price	Total

Sub-Total:

Tax:

Total:

