

A PERFECT BUSINESS plan

6 STEPS

Step 1: Develop your vision



Step 2: Develop your mission



Step 3: Set your goals



Step 4: Develop your strategy



Step 5: Develop your tactics



Step 6: Your action plan



STARTING BUSINESS

checklist

Date:



PLANNING



MARKETING



BRANDING



BUSINESS

VISION & MISSION

description

VISION

Vision

ASPIRATIONS AND GOALS

FUTURE

CREATIVITY

CLEAR DIRECTION

EFFECT

MISSION

Mission

BUSINESS OBJECTIVE

DEVELOPMENT

BRAND VALUE

PRODUCTS QUALITY

POSITIVE ENERGY

VISION

planner

CORE PURPOSE _____

CORE VALUES

WHO WE SERVE

WHY WE'LL WIN

WHAT'S MOST IMPORTANT

NORTH STAR GOAL

1 YEAR GOAL

FUTURE	DATE	PROFIT

3 YEAR GOAL

FUTURE	DATE	PROFIT

TARGET MARKET

Market Name :

Demographics

Desired Project Types

① _____

② _____

③ _____

④ _____

⑤ _____

⑥ _____

Typical Client Budget : _____

Client Needs & Motivation : _____

Industry/Niche : _____

Your Unique Selling Proposition (USP) : _____

Your Target Market : _____

MARKETING PLANNER

NAME :

DATE :

	ITEM	TYPE	QTY	BUDGET	PRICE
TRACKER					

KY TOOLS + RESOURCES

-
-
-
-
-
-

MARKETING STRATEGY

PRODUCT/SERVICE	BILL PAYMENT	PRICE

MARKETING CHECKLIST

SEGMENT YOUR LISTS



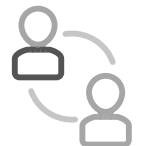
SEND TARGETED COMMUNICATIONS



COMMUNICATE WITH YOUR SALES TEAM



DETERMINE YOUR "DIFFERENTIATOR"



GET SOME SWAG



CREATE A FOLLOW UP FUNNEL OR FLOW



MONTHLY CREATIVE ideas

MONTH:

MON	TUES	WED	THU	FRI	SAT	SUN

MONTHLY GOALS

1.

2.

3.

TO DO LIST

- _____
- _____
- _____
- _____
- _____

MONTHLY

planner

GOAL	START DATE:	DUE DATE:
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ACTION STEPS

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POSSIBLE OBSTACLES

HOW TO OVERCOME OBSTACLES

WEEKLY

planner

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

SUNDAY

DAILY

planner

TODAY:

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

NOTES

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TO-DO

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YEARLY GOAL

planner

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

GOAL ACTION plan

GOAL

START DATE:

DUE DATE:

GOAL PROGRESS:

0%

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

100%

ACTION STEPS

POSSIBLE OBSTACLES

HOW TO OVERCOME OBSTACLES

GOAL

tracker

MAIN GOAL

ACTION STEPS

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

GOAL 2

ACTION STEPS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

GOAL 3

ACTION STEPS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

GOAL 4

ACTION STEPS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

GOAL 5

ACTION STEPS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

PROJECT **planner**

PROJECT

BUDGET

Start Date: _____

Due Date: _____

Duration _____

Completed _____

TO-DO

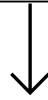
IDEAS

CONTACT

AFTER ACTION REVIEW

PROJECT ACTION plan

GOAL



Break down your goal into 3 simple targets:

Target 1

Target 2

Target 3



Action Steps:

Action Steps:

Action Steps:

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MEETING

notes

Date:

Subject:

Place :

Agenda

1.

2.

3.

4.

5.

Objectives

Presenters

Action Owner

Notes

1.

2.

3.

4.

5.

6.

7.

MONTHLY BUDGET

MONTH OF

INCOME			
DATE	SOURCE	CATEGORY	AMOUNT

BILLS & FIXED EXPENSES		
DATE	SOURCE	AMOUNT

VARIABLE EXPENSES		
DATE	SOURCE	AMOUNT

SUMMARY	
SOURCE	AMOUNT
INCOME	
BILLS & FIXED EXPENSES	
VARIABLE EXPENSES	
BALANCE	

