

A top-down view of a workspace on a light-colored marble surface. In the lower-left, a white cup of coffee with a thick, golden-brown foam sits on a matching saucer. To its right and slightly behind, a silver laptop is partially open, showing its keyboard and a dark screen. A light-colored book with a simple cover is tucked under the laptop. The Apple logo is visible on the back of the laptop. The overall lighting is soft and even, creating a clean, professional aesthetic.

# *IRRESISTIBLE BUSINESS PLANNER*

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

PLANNER

# "LAUNCH YOUR DREAM BUSINESS"

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?

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## SOLUTION

How will my business help solve this problem?

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## BUSINESS MODEL

How will my business make money?

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## USP

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

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## PROMOTION

How will I reach my customers?

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## TARGET CUSTOMERS

What type of customers will I serve?

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## KEY METRICS

How will I measure success?

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## FINANCIAL PROJECTIONS

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

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# 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"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

| 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

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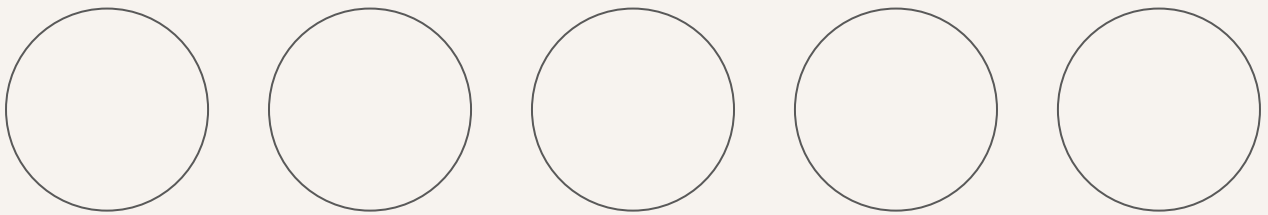
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| PRIMARY LOGO | VARIANT LOGO1 | VARIANT LOGO2 |
|--------------|---------------|---------------|
|              |               |               |

COLOR PALETTE



| FONTS | PATTERNS | OTHER |
|-------|----------|-------|
|       |          |       |

# notes on branding

FRIENDLY

WARM

INSPIRING

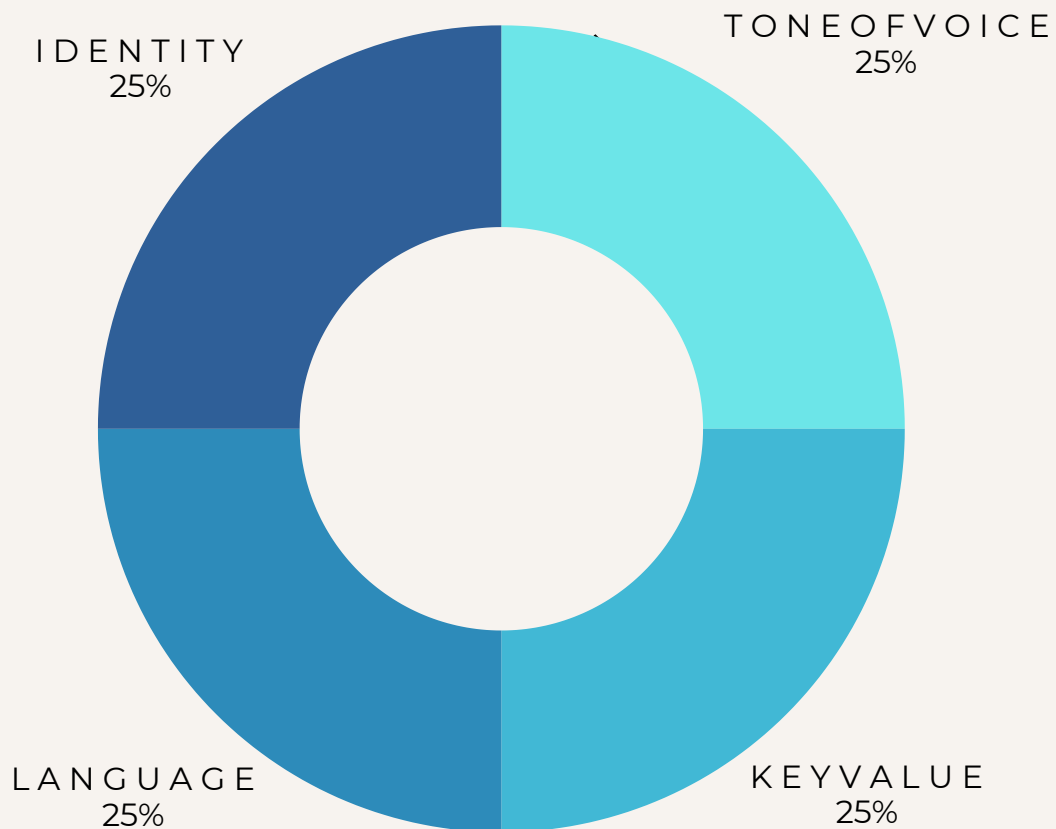
PROFESSIONAL

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

MY MAIN GOAL

|  |
|--|
|  |
|  |
|  |
|  |

SUB GOAL1

|  |
|--|
|  |
|--|

SUB GOAL2

|  |
|--|
|  |
|--|

SUB GOAL3

|  |
|--|
|  |
|--|

STEPS

- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet

STEPS

- ☐ Lorem ipsum dolor sit amet
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- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
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- ☐ Lorem ipsum dolor sit amet

STEPS

- ☐ Lorem ipsum dolor sit amet
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- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet
- ☐ Lorem ipsum dolor sit amet

TARGET DATE

|                          |
|--------------------------|
| <input type="checkbox"/> |
|--------------------------|

TARGET DATE

|                          |
|--------------------------|
| <input type="checkbox"/> |
|--------------------------|

TARGET DATE

|                          |
|--------------------------|
| <input type="checkbox"/> |
|--------------------------|

*FORMS,  
LOGS &  
TRACKERS*

# time log

MONTH \_\_\_\_\_

| DATE     | TASK                       | START<br>TIME | END<br>TIME | TIME<br>SPENT |
|----------|----------------------------|---------------|-------------|---------------|
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
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| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
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| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |
| 09-08-25 | Lorem ipsum dolor sit amet |               |             |               |



# order form

CUSTOMER

ORDER NO:

DATE:

| DESCRIPTION                | QTY | PRICE | TOTAL |
|----------------------------|-----|-------|-------|
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |

PAYMENT INFORMATION

SUBTOTAL:

TAX:

TOTAL:

NOTES

thank you!

# invoice form

| RECIPIENT |
|-----------|
|           |

INVOICE NO:

ISSUE DATE:

| DESCRIPTION                | QTY | PRICE | TOTAL |
|----------------------------|-----|-------|-------|
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |
| Lorem ipsum dolor sit amet |     |       |       |

| PAYMENT INFORMATION |
|---------------------|
|                     |

SUBTOTAL:

TAX:

TOTAL:

| NOTES |
|-------|
|       |

# sales tracker

TIME PERIOD \_\_\_\_\_

| DATE     | ITEM                       | REVENUE | FEES | PROFIT | SHIPPED |
|----------|----------------------------|---------|------|--------|---------|
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |
| 09-08-25 | Lorem ipsum dolor sit amet |         |      |        |         |

# shipping tracker

TIMEPERIOD \_\_\_\_\_

| DATE     | SHIPPED TO                 | COST | TRACKING NO. | NOTES |
|----------|----------------------------|------|--------------|-------|
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |
| 09-08-25 | Lorem ipsum dolor sit amet |      |              |       |

# returns tracker

TIMEPERIOD \_\_\_\_\_

[illegible]

# stock tracking

| ITEM<br># | DESCRIPTION | QTY | LOCATION | LAST<br>UPDATED |
|-----------|-------------|-----|----------|-----------------|
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |
|           |             |     |          |                 |

# 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    |  |

## new products to bring out

\$40



PINTEREST MARKETING  
STRATEGIES

\$24.95



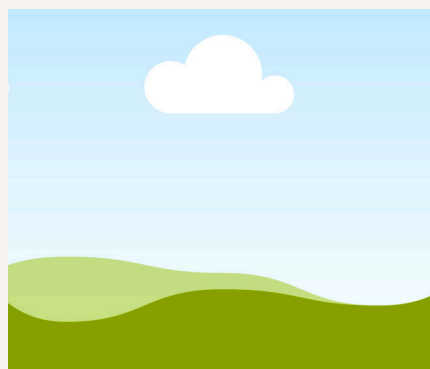
THE VIRAL VIBE

\$170



THE REEL ATTRACTION  
MASTERCLASS

\$34.95



SELF ACCEPTANCE EBOOK +  
WORKBOOK

\$37



735 STOCK IMAGERY  
COLLECTION

\$30



985 STOCK IMAGERY  
COLLECTION



# new products list

|                          |
|--------------------------|
| CATEGORY:                |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

|                          |
|--------------------------|
| CATEGORY:                |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

|                          |
|--------------------------|
| CATEGORY:                |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

|                          |
|--------------------------|
| CATEGORY:                |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

# 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      |
|--------------------------|
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

| TOP KEYWORDS             |
|--------------------------|
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |
| <input type="checkbox"/> |

| 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/<br>SERVICES | WHAT CAN I<br>LEARN FROM<br>THEM? | HOW CAN I<br>DIFFERENTIATE<br>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 |
|-----|-----|-----|-----|-----|-----|-----|
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| NOTES |
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# social media notes

## BEST TIMES TO POST

|           | SUN | MON | TUE | WED | THU | FRI | SAT |
|-----------|-----|-----|-----|-----|-----|-----|-----|
| FACEBOOK  |     |     |     |     |     |     |     |
| INSTAGRAM |     |     |     |     |     |     |     |
| PINTEREST |     |     |     |     |     |     |     |
| TIKTOK    |     |     |     |     |     |     |     |
| TWITTER   |     |     |     |     |     |     |     |
| YOUTUBE   |     |     |     |     |     |     |     |
|           |     |     |     |     |     |     |     |
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[illegible][illegible]

# 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: \_\_\_\_\_

[illegible]

| KEY TAKEAWAYS |
|---------------|
| FACEBOOK      |
| INSTAGRAM     |
| PINTEREST     |
| TIKTOK        |
| TWITTER       |
| YOUTUBE       |
|               |
|               |

| NOTES |  |
|-------|--|
|       |  |

# discounts & promos

| COUPON | SALE | NAME | START<br>DATE | END<br>DATE | # OF<br>ORDERS | REVENUE | NOTES |
|--------|------|------|---------------|-------------|----------------|---------|-------|
|        |      |      |               |             |                |         |       |
|        |      |      |               |             |                |         |       |
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*BUSINESS  
FINANCES*

# expenses log

TIME PERIOD \_\_\_\_\_

| DATE | DESCRIPTION | CATEGORY | PURCHASED<br>FROM | AMOUNT |
|------|-------------|----------|-------------------|--------|
|      |             |          |                   |        |
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# income & expenses

MONTH \_\_\_\_\_

| DATE | DESCRIPTION | INCOME | EXPENSE | RUNNING<br>TOTAL |
|------|-------------|--------|---------|------------------|
|      |             |        |         |                  |
|      |             |        |         |                  |
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# annual profit & loss

YEAR: \_\_\_\_\_

|       | SALES | MATERIALS | WAGES | FULFILLMENT | MARKETING | DEPRECIATION | OTHER | PROFIT<br>BEFORE TAXES |
|-------|-------|-----------|-------|-------------|-----------|--------------|-------|------------------------|
| JAN   |       |           |       |             |           |              |       |                        |
| FEB   |       |           |       |             |           |              |       |                        |
| MAR   |       |           |       |             |           |              |       |                        |
| APR   |       |           |       |             |           |              |       |                        |
| MAY   |       |           |       |             |           |              |       |                        |
| JUN   |       |           |       |             |           |              |       |                        |
| JUL   |       |           |       |             |           |              |       |                        |
| AUG   |       |           |       |             |           |              |       |                        |
| SEP   |       |           |       |             |           |              |       |                        |
| OCT   |       |           |       |             |           |              |       |                        |
| NOV   |       |           |       |             |           |              |       |                        |
| DEC   |       |           |       |             |           |              |       |                        |
| TOTAL |       |           |       |             |           |              |       |                        |

# deductions log

YEAR \_\_\_\_\_

| DATE | ITEM | CATEGORY | RECEIPT | VALUE |
|------|------|----------|---------|-------|
|      |      |          |         |       |
|      |      |          |         |       |
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|      |      |          |         |       |

# overview of potential deductions

|             |
|-------------|
| HOME OFFICE |
|             |

|                          |
|--------------------------|
| HEALTH INSURANCE (MAYBE) |
|                          |

|           |
|-----------|
| EDUCATION |
|           |

|     |
|-----|
| CAR |
|     |

|                    |
|--------------------|
| RETIREMENT SAVINGS |
|                    |

|                       |
|-----------------------|
| SELF-EMPLOYMENT TAXES |
|                       |

|                    |
|--------------------|
| BUSINESS INSURANCE |
|                    |

|                 |
|-----------------|
| OFFICE SUPPLIES |
|                 |

|               |
|---------------|
| LOAN INTEREST |
|               |

|                    |
|--------------------|
| PHONE AND INTERNET |
|                    |

|                       |
|-----------------------|
| BUSINESS TRAVEL+MEALS |
|                       |

|               |
|---------------|
| START-UPCOSTS |
|               |

|             |
|-------------|
| ADVERTISING |
|             |

|                     |
|---------------------|
| CERTAIN MEMBERSHIPS |
|                     |

Please note that these tax deduction categories are suggestions. You'll want to check for yourself what deductions are available to you. This depends on your location, your situation and the tax year.

*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 |
|-----|-----|-----|-----|-----|-----|-----|
|     |     |     |     |     |     |     |
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| NOTES                    |                          |                          |
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| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

# february

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
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| NOTES                    |                          |                          |
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# march

| SUN | MON | TUE | WED | THU | FRI | SAT |
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# april

| SUN | MON | TUE | WED | THU | FRI | SAT |
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# may

| SUN | MON | TUE | WED | THU | FRI | SAT |
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# june

| SUN | MON | TUE | WED | THU | FRI | SAT |
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| NOTES                    |                          |                          |
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# july

| SUN | MON | TUE | WED | THU | FRI | SAT |
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# august

| SUN | MON | TUE | WED | THU | FRI | SAT |
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| NOTES                    |                          |                          |
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# september

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# october

| SUN | MON | TUE | WED | THU | FRI | SAT |
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# november

| SUN | MON | TUE | WED | THU | FRI | SAT |
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| NOTES                    |                          |                          |
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# december

| SUN | MON | TUE | WED | THU | FRI | SAT |
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| NOTES                    |                          |                          |
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*PLANNING  
THE WEEKS*

# weekly planner

WEEK OF: \_\_\_\_\_

|            |  |  |  |  |  |
|------------|--|--|--|--|--|
|            |  |  |  |  |  |
| MON        |  |  |  |  |  |
| TUE        |  |  |  |  |  |
| WED        |  |  |  |  |  |
| THU        |  |  |  |  |  |
| FRI        |  |  |  |  |  |
| SAT<br>SUN |  |  |  |  |  |

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

| NOTES |
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|       |

# 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



*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 full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice or general writing. There are no margins, text, or other markings on the page.

# 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

PLANNING  
THE WEEKS

MARKETING  
PLANNER

GETTING  
STARTED

PLANNING  
THE DAYS

PLANNING  
THE YEAR

FORMS, LOGS  
& TRACKERS

PLANNING  
THE MONTHS

MANAGING  
MY PRODUCTS

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