

KATIE BARBER

START UP

Business Planner BUNDLE

- WWW.KATIEBARBERMARKETING.COM

PLAN IT. WRITE IT DOWN. GET IT DONE!

Business Name

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NAME IDEA	IS THE URL AVAILABLE?		HOW MEMORABLE? (SCALE OF 1-10)
Creative Co.	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	

Other Notes:

Core Concept

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WHAT PRODUCT OR SERVICE ARE YOU OFFERING?

WHO IS YOUR IDEAL CLIENT?

WHERE AND HOW CAN YOU REACH YOUR IDEAL CLIENTS?

Write down the marketing channels you will focus on first (paid ads, free content etc).

Value Proposition

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WHY WILL CUSTOMERS BUY FROM YOU?

HOW IS YOUR PRODUCT/SERVICE BETTER THAN COMPETITION?

WHAT ARE THE MAIN PAIN POINTS YOU ARE SOLVING?

Do you help save your customers time? Money? or maybe you help their business

WHAT ARE THE MAIN PAIN POINTS YOU ARE SOLVING?

1-3 sentences/headlines you would use in a facebook ad - make sure these reflect the pain points of your customers

Target Audience

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SHEET 1 OF 2

CUSTOMER AGE:

WHERE DO THEY LIVE:

WHAT PLATFORMS DO THEY USE:

**WHAT KIND OF BUSINESSES
DO THEY BUY FROM:**

ex. Family owned small businesses etc. - the
question to also ask is why do they buy from there?

WHAT WEBSITES DO THEY VISIT:

**WHAT KIND OF STYLE
DO THEY LIKE:**

ex. Are they conservative or really hipster?

**WHAT KIND OF MEDIA
DO THEY CONSUME:**

ex. Looking at funny memes, scrolling aspirational instagram posts etc?

Target Audience

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SHEET 2 OF 2

FAMILY STATUS:

WHAT DO THEY TALK ABOUT:

WHAT ARE THEIR HOBBIES:

WHAT ARE THEIR MAIN WORRIES IN LIFE:

ex. Job Stability and a Strong Relationship - think about how your product/service helps to solve their problems

WHAT ARE THEIR GOALS/ASPIRATIONS IN LIFE:

ex. Getting promoted or finding a right spouse - again, think about how your product/service helps them reach their goal

Brand Voice

Brand Voice is how you determine how you speak to your potential customers in your messaging (social media channels, website etc). Finding the right voice helps you to connect with your audience makes you more trustworthy.

Below you can select a few keywords (and add your own) that will help you determine your brand voice. For example think if your brand is conveying confidence and authority or being simple and casual? Is it uplifting and motivational or down to earth?

BRAND CHARACTER:

ex. Confident , Playful, Creative

BRAND LANGUAGE:

ex. Casual - Conversational, Funny, Formal & Professional

BRAND TONE:

Funny

Neutral

Serious

Casual

Neutral

Formal

Irreverent

Neutral

Respectful

Enthusiastic

Neutral

Straight Forward

Business Overview

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SHEET 1 OF 2

BUSINESS NAME:

Brief description:

THE BUSINESS WILL SELL:

Physical product

Digital product

Physical service

Digital Service

THE BUSINESS WILL SELL:

To an end consumer

To another business

THE SCOPE OF THE BUSINESS IS:

Primarily local

Mostly international

WHERE IS YOUR BUSINESS LOCATED:

Storefront

Website

Home

Business Overview

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SHEET 2 OF 2

CONTACT DETAILS:

MAIN SERVICE/PRODUCT:

MAIN BUSINESS GOAL:

Both what you want the customers to get out of your product/service and what you want to achieve

BUSINESS TEAM:

Who do you need to hire - what kind of help will you need

STEPS TO GET STARTED:

What do you need to do and focus on first to get thing moving - what do you need to do to get your first customer?

Strategy Overview

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CONTACT DETAILS:

MAIN SERVICE/PRODUCT:

HOW DO YOU REACH YOUR CLIENTS:

How will people know about what you do and how you can help them?

YOUR CORE PRODUCT/SERVICE:

What is the main product service you will offer and what problem it will solve for the customer?

WHAT MESSAGE TO YOU WANT TO CONVEY:

What makes you and your product/service different - think of this as you brand story.
Ex. you wanted to start a business but there were no suitable business planner bundles available for a reasonable cost that actually looked good so you started creating business planners (hint - that's what I'm doing:)

Business Plan

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Problem

Your Solution

Key Metrics

Unique Value Proposition

Unfair Advantage

Selling/Marketing Channels

Customer Segments

Cost Structure

Revenue Streams

MINIMALIST BUSINESS PLAN

Business Model

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Key Partners (Who will help you?)	
Key Activities (What will you do?)	Key Resources (What you need to run the business?)
Main Value Proposition (How you will help?)	Customer Relationships (How and where you will interact?)
Selling/Marketing Channels (How will people know you and how you will deliver?)	Customer Segments (Who will you help?)
Cost Structure (What will you have to pay for?)	Revenue Streams (What will customers be paying for?)

Go to Market

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SHEET 1 OF 2



Use this exercise to define various aspects of your business to get more clarity and know what to prioritize.
Use the next page if you need extra space to fill out the the business information.

Go to Market

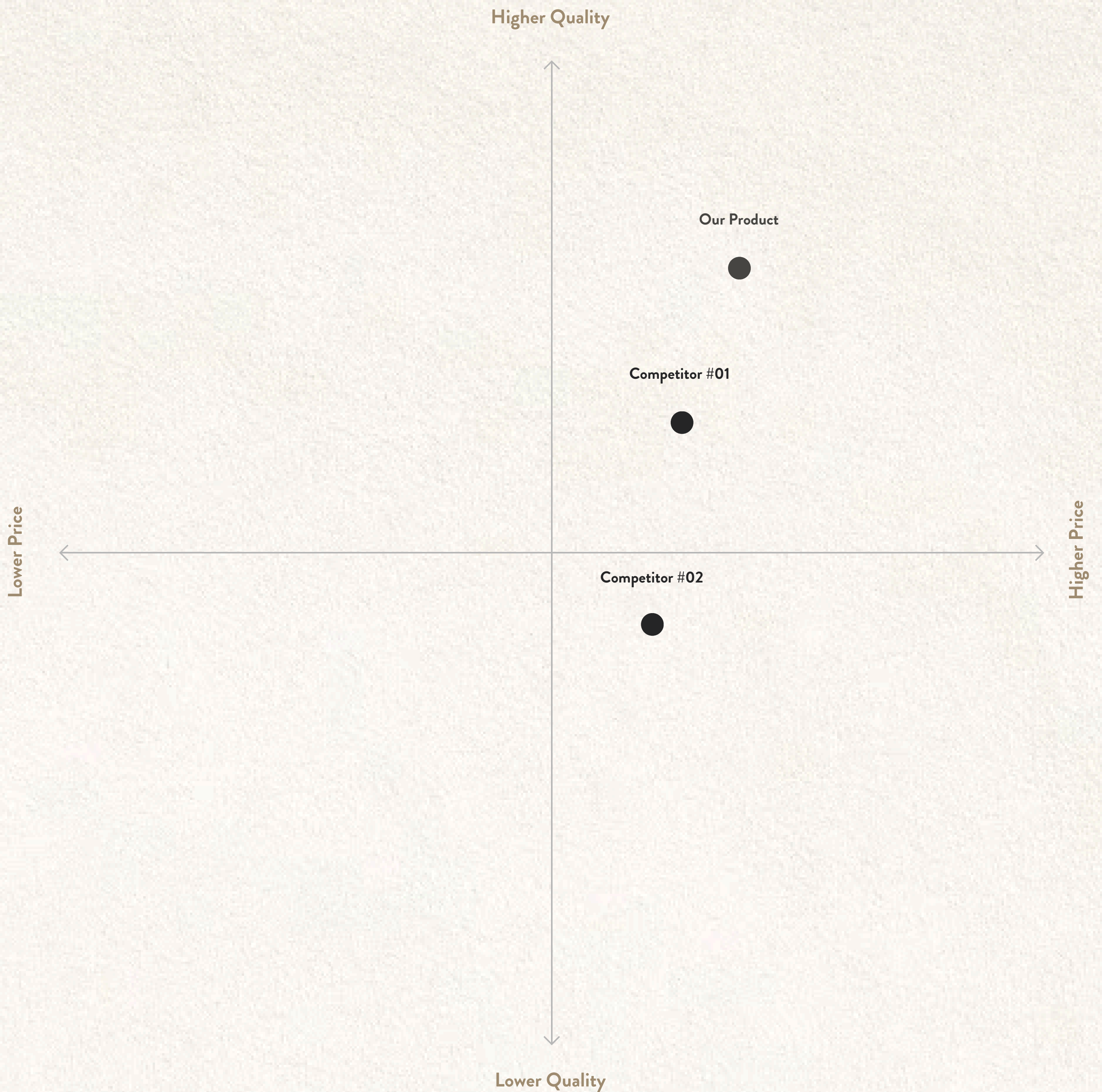
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SHEET 2 OF 2

<p>What?</p>	<p>Who?</p>
<p>When?</p>	<p>Why?</p>
<p>How?</p>	<p>Where?</p>

Strategic Placement

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Define where your product will fit in the marketplace - is it more affordable or high priced, is it higher quality or lower quality compared to your competitors.
Feel free to switch the axis titles to something else.

S.W.O.T Analysis

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<p>Strengths:</p>	<p>Weaknesses:</p>
<p>Opportunities:</p>	<p>Threats:</p>

Define your business idea's strengths, weaknesses, opportunities & threats

A.I.D.A Model

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Awareness

How will people get to know about your brand/product/service?



Interest

How will you get potential clients interested in trying your product/service?



Desire

How will you get potential clients want to try your product/service?



Action

How will you get potential clients commit and purchase or try out your product/service?

Competitor Analysis

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WHO ARE YOUR
TOP(3) COMPETITORS?

WHAT ARE
THEY OFFERING

WHO ARE THEIR STRENGTHS AND WEAKNESSES?

Strengths:

Weaknesses:

HOW ARE THEY REACHING THEIR CUSTOMERS?

Are they reaching new customers through ads, youtube content, blog posts etc.
how did you find out about them?

WHAT IS YOUR COMPETITOR PRICING?

This gives you an idea how much you can/should charge.

Competitor Analysis

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When researching your competitors, try to deconstruct what they offer, what do they charge, how do they market and interact with their clients. Below are 4 important aspects to analyse in your competition:

1. Reaching Customers

What kind of channels is your competition using to reach new customers. Are they selling on some large platform (Amazon, Ebay etc) that gets organic traffic or are they actively using social media (Youtube, Instagram etc) to put out new valuable content and using upsells? If they have a website, note down what you like about it and what could be done better.

2. Marketing

2. How is your competition marketing their products. For example are they actively putting out new content (social media, blog, youtube etc) that gets them attention or are they doing paid advertising? Take a look at the type of ads and content they are putting out and how it is performing (getting likes, views, shares

3. Value Proposition

What are they offering their customers. How are they solving the same problem you are solving (also think how you could do it better). What pain points do their customers have (great resource for this is to go through your competitors reviews and see if something sticks out).

4. Pricing

How much is your competition asking for their product/service. Think how you could provide even more value for the same price? Could you even ask a premium price if your product/service offered a better solution to the problem?

Competitor Analysis

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COMPETITOR NAME

HOW ARE THEY REACHING THEIR CUSTOMERS

HOW ARE THEY MARKETING

WHAT PROBLEM DO THEY SOLVE FOR THEIR CLIENTS

HOW ARE THEY PRICING THEIR PRODUCT/SERVICE

Competitor Analysis

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COMPETITOR NAME

WHAT ARE THEY DOING WELL

WHAT YOU COULD DO BETTER

WHAT ARE YOUR STRENGTHS THAT MAKE YOU BETTER

Product/Service Research

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PRODUCT/SERVICE NAME:

**LIST OF FEATURES
CUSTOMERS WANT:**

**LIST OF FEATURES
COMPETITORS HAVE:**

**FEATURES COMPETITORS
ARE LACKING:**

**BRAND NEW
FEATURE IDEAS:**

**LSIT OF FEATURES FOR
MY PRODUCT/SERVICE:**

**OTHER NOTES
& IDEAS:**

Products/Services Offered

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NAME OF PRODUCT/SERVICE:	PRICE:	OTHER NOTES:
Website Design	\$2900	Basic Package
Logo Design	from \$450	1 Concept, 3 Revisions
Consultation	\$150/hour	Minimum 1 hour
Other Design Services	\$75/hour	Graphic Design

Product/Service Pricing

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PRODUCT/SERVICE PRICING CALCULATOR:

Hourly Wage*	
Units Produced Per Hour**	

PRODUCT/SERVICE PRICING CALCULATOR:

Materials Cost Per Unit	
Packaging Cost Per Unit	
Other Costs Per Unit (electric bills etc)	

TOTAL UNIT COST (ALL OF THE ABOVE COMBINED)	
Product Markup (for 30% put 1.3 etc)	
TOTAL PRODUCT PRICE (TOTAL UNIT COST X MARKUP)	

METHODS OF GETTING PAID:

<input type="checkbox"/>	Paypal	<input type="checkbox"/>	Check
<input type="checkbox"/>	Stripe	<input type="checkbox"/>	

* The wage you will pay a contractor/employee or yourself

** Either items produced per hour or how many hours it will take to finish a service

Other notes:

Where & How to Sell

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WHERE TO SELL ONLINE:

<input type="checkbox"/>	Etsy
<input type="checkbox"/>	Amazon
<input type="checkbox"/>	Ebay
<input type="checkbox"/>	

<input type="checkbox"/>	Print-On-Demand
<input type="checkbox"/>	Facebook Market
<input type="checkbox"/>	E-Commerce Website
<input type="checkbox"/>	

PHYSICAL PLACES TO SELL;

<input type="checkbox"/>	Retail store
<input type="checkbox"/>	Pop-Up Store
<input type="checkbox"/>	Physical Market
<input type="checkbox"/>	Sell Out of Home

<input type="checkbox"/>	Sell Out of a Car
<input type="checkbox"/>	Kiosk
<input type="checkbox"/>	Partner with a Store
<input type="checkbox"/>	Fairs/Conventions

SELLING METHODS:

<input type="checkbox"/>	Direct to Customer
<input type="checkbox"/>	Partner with a Distributor
<input type="checkbox"/>	Partner with a Store
<input type="checkbox"/>	Partner with a non-competitor

<input type="checkbox"/>	Set up an Affiliate Program
<input type="checkbox"/>	Dropshipping
<input type="checkbox"/>	Whitelabel
<input type="checkbox"/>	

Other notes:

What is Required

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ITEM:	REQUIRED BEFORE OPENING?		OTHER NOTES:
Website	YES	NO	
Logo	YES	NO	
Retail Space	YES	NO	
Insurance	YES	NO	
Licences	YES	NO	
Warehouse Space	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	

Startup Costs

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ITEM:	COST
Website Design	
Raw Materials	
Logo Design	
Packaging	
Marketing (3 months)	
Warehouse Space	
Manufacturing	

To-Do List

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Date:

ITEM NAME	DUE DATE
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
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<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

OTHER NOTES

Daily Planner

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Date:

TO DO

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

PRIORITIES

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

APPOITMENTS

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OTHER NOTES

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Weekly Planner

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Date:

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY & SUNDAY

OTHER NOTES

Monthly Schedule

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Date:

WEEK 01

WEEK 02

WEEK 03

WEEK 04

Yearly Goals

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Date:

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

Goal Setting

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GOAL NO.1

Deadline:

Outcome I want to achieve:

Why this is important:

Steps I have to take:

GOAL NO.2

Deadline:

Outcome I want to achieve:

Why this is important:

Steps I have to take:

GOAL NO.3

Deadline:

Outcome I want to achieve:

Why this is important:

Steps I have to take:

Goal Setting

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My Vision or goal:

ex. build a 6 figure passion business in the next two years.

Steps to Take:

ex. building a brand around my expertise

Financial Cost:

ex. hiring freelancers

Actions to Take:

ex. building out my portfolio website

Potential Problems:

ex. saturated marketplace, how you
I differentiate?

Progress Tracker:

what have I done already
to achieve my goal

Goal Planner

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THE GOAL

THE STRATEGY

STEPS TO TAKE

-
-
-
-
-
-
-

NOTES

Checklist

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01.

02.

03.

04.

05.

06.

07.

08.

09.

10.

11.

12.

13.

14.

15.

Other:

Notes

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