#### KSB Online Marketing

#### 2021

# Business Planning

PLAN IT. WRITE IT. DO IT!

her there fellow biz owner,

Yay! So you've got big ideas for this new year... but where in the heck do you start and how can you make sure you stay committed?

Not exciting, and not always pleasant or fun, but you're about to take the most important step in experiencing the life and business you want by *planning* for it.

Following these 6 steps will help you create an actionable blueprint that results in rewards, BIG rewards. Like *beyond your wildest dreams* kind of rewards. Because when you plan, you give yourself a roadmap and set yourself up to succeed!

But I need you to know something before we dive in. This will *not* be quick or easy. In fact, most business owners skip planning even though they know having a plan is crucial to making the money and living the life they want. Because it takes time, effort and creative energy.

What I know for sure is that *doing* these 6 steps is worth it! By evaluating your current situation, getting 100% clear about your vision, and mapping out a totally doable action plan, you'll stay committed to reaching (and even exceeding) your biggest goals.

Because each step requires one to two hours of focused time to complete, I recommend you work on just one step per week. Block out two hours every week and don't let *anything* or *anyone* get in the way of doing the work. This work is important, and results in you having an actionable blueprint that brings your vision to life.

If you get stuck or have questions,  $\underline{message}$  me. I love learning more about business owners like you and offer help along the way.

You're heading for great things my fellow business owner. Here's to you for having the courage to dream big and the discipline to follow through in this new year!

Your biggest fan,

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Tep# 1: Evaluate Your Current Situation

Are you making the money you need or want? Are you reaching the clients you want to work with? Are you developing systems and processes to streamline your time and effort? Are your services in demand with a specific target audience?

These are just a few of the questions to ask yourself as you evaluate your current situation. Getting clear about where you are can better help you understand what you'll want to include in your vision for the future.

Use the following pages to get clear about where you are right now. Try not to judge yourself. Simply answer the prompts and be open to where the answers lead you.

This can be a very difficult step for business owners who aren't making the money they need or want to or aren't getting the flow of clients they'd like. This step may make you uncomfortable because you have to "see" what's really going on. If this is you, I encourage you to work through this step slowly. Think of yourself as an objective observer who wants to understand the bigger picture.

As you work through this step, you may discover a new idea for a new product or service. Take note of it and give yourself permission to pursue it *after* you complete these steps 1-3. As creators, it's common to use our new ideas to distract us from dealing with the practical side of business.



BUSINESS NAME:	
BRIEF DESCRIPTION:	
MY BUSINESS CURRENTLY SELLS:	
PHYSICAL PRODUCT	DIGITAL PRODUCT
PHYSICAL SERVICE	DIGITAL SERVICE
MY BUSINESS SELLS TO:	
AN END CONSUMER	ANOTHER BUSINESS
THE SCOPE OF MY BUSINESS IS:	
PRIMARILY LOCAL	MOSTLY INTERNATIONAL
WHERE MY BUSINESS IS LOCATED:	
STOREFRONT	WEBSITE
НОМЕ	



WHAT PRODUCTS OR SERVICES AM I CURRENTLY OFFERING?
WHAT PRODUCTS/SERVICES ARE SELLING WELL AND WHICH ONES AREN'T WORKING?
DECRIBE MY CURRENT CLIENTS?
WHERE AND HOW AM I REACHING MY CURRENT CLIENTS?
WHAT MARKETING CHANNELS WORK BEST IN CONVERTING (PAID ADS, FREE CONTENT. REFERRAL, ETC)?



NAME OF EXPENSE	COST	KEEP OR CUT
	_	
	_	
TOTAL:		



NAME OF PRODUCT/SERVICE;	PRICE:	OTHER NOTES:
WEBSITE DESIGN	\$2900	BASIC PACKAGE

#### Product/Service relation

PRODUCT/SERVICE:		
WHERE AM I ADVERTISING THIS PRODUCT/SERVICE?	IS THERE A MEASURABI	E ROI?
AM I COLLECTING AND USING COMPELLING TESTIMONIALS?	DO MY CURRENT CLI FIND VALUE IN THIS (	ENTS DFFER?

#### Product/Service relation

PRODUCT/SERVICE:	
IS THIS PRODUCT/SERVICE IN DEMAND?	ARE THERE WAYS I CAN ADD MORE VALUE?
WHERE AM I ADVERTISING THIS PRODUCT/SERVICE?	IS THERE A MEASURABLE ROI?
AM I COLLECTING AND USING	DO MY CURRENT CLIENTS
COMPELLING TESTIMONIALS?	FIND VALUE IN THIS OFFER?

Flent (): Reflect on Your Big ()

Did you make more or serve more clients this past year? Did you develop new partnerships that helped drive your business? Did you learn something new that shifted how you do business?

It may seem counterintuitive to reflect on the past to plan your future. But, if you don't take time to reflect on what worked in the past, you may be led down a path of reinventing the wheel instead of building on what already works.

As business owners, we tend to forget to notice our wins and celebrate what went *right* in our lives and businesses.

Take just a few minutes to reflect on this past year. What worked really well? What did you love doing? What did you learn or accomplish this past year that surprised you?

You may find that you enjoyed doing something that fell outside of your typical "scope of work." Or, you may have discovered that you honed a new skill or talent. Or, you may just be proud of yourself for making it through an incredibly challenging year. Whatever it was that worked well for you, take note of it and celebrate those wins.

Use the following pages to revisit what went well and what you're most proud of.



WHAT SUCCESS DID I SEE THIS PAST YEAR?
WHAT DID I GET BETTER AT THAT SURPRISED ME?
WHAT VALUABLE LESSON DID I LEARN THAT WILL HELP ME BE MORE SUCCESSFUL IN THE NEW YEAR?



WHAT AM I MOST PROUD OF?
WHAT DID I REALLY ENJOY DOING THIS PAST YEAR?
WHAT GAVE ME MORE CONFIDENCE IN LIFE OR IN BUSINESS?

Fly # 3: Clarify Your Future Vision

What do you *really* want to experience by the end of this new year? What are you doing at the end of this new year that was just a dream or an idea at the start of the year?

In this step, you'll clarify your vision for your life and your business. You'll notice some questions regarding your brand voice and your business persona. The answers all work together to support you in taking action once you clearly define your vision.

You'll want to work through this step when you can really dive deep, without distractions, and let yourself be carried away by possibilities. Allow yourself to dream big and explore what's really meaningful to you.

If you get stuck or find you're not really sure what you want to experience by the end of this new year, ask yourself the following questions to help you get clear and concise about what you *really* want: What would you like to be doing by the end of this new year that you aren't able to do right now?

What does a perfect day look like to you? How are you spending your time? Who are you spending your time with?

Have fun and let yourself go wild as you clarify your vision. This is *your* life. You get to call the shots. And you have the *power* and the *ability* to experience exactly what you want.



WHAT WILL I ACHIEVE IN THE NEXT 3-5 YEARS?
WHY ARE THESE GOALS IMPORTANT TO ME?
WHAT DOES REACHING THESE GOALS LOOK LIKE? PAINT A PICTURE OF SUCCESS.



IN ONE YEAR FROM NOW, WHAT WILL MY LIFE/BIZ LOOK LIKE?
WHO AM I SPENDING TIME WITH AND WHAT AM I DOING?
PAINT A DETAILED PICTURE OF WHAT MY LIFE AND BUSINESS LOOK LIKE ONE YEAR FROM NOW.
FOCUS ON THE FEELINGS AND EXPERIENCES I WANT IN 2021



HOW DO MY CLIENTS DESCRIBE ME? WHAT WORDS DO THEY USE?
HOW WOULD I DESCRIBE MYSELF? WHAT PERSONALITY TRAITS DO FAMILY OR FRIENDS PRAISE ME FOR?
WHAT ARE MY THREE CORE VALUES?
WHO DO I WANT TO BECOME AND WHY?
WHAT KIND OF PERSON DO I WANT TO BECOME?



WHAT MAKES ME UNIQUE?
IF I DON'T KNOW THE ANSWER, I CAN ASK MY FRIENDS AND COLLEAGUES
WHAT DO MY CLIENTS SAY ABOUT WORKING WITH ME?
IF I DON'T KNOW THE ANSWER, I CAN ASK MY CLIENTS.
WHAT SPECIFIC RESULTS HAVE I HELPED MY CLIENTS ACHIEVE?
IF I DON'T HAVE THIS INFORMATION, I CAN ASK MY CLIENTS.



HOW WOULD I DESCRIBE MY BUSINESS PERSONA?
USE THIS RESOURCE FOR CREATING YOUR BRAND ARCHETYPE:  HTTPS://ICONICFOX.COM.AU/BRAND-ARCHETYPES/#HERO
WHAT TONE OF VOICE DOES MY BUSINESS HAVE OR WOULD I LIKE IT HAVE?
WHAT WORDS OR PHRASES DO I WANT PEOPLE TO ASSOCIATE WITH MY BUSINESS BRAND?
HOW DO MY IDEAL CLIENTS SEE THEMSELVES OR HOW DO THEY WANT TO SEE THEMSELVES)?
CONSIDER MY IDEAL CLIENT AND WHAT'S IMPORTANT TO THEM



WHY WILL CUSTOMERS BUY FROM ME?
HOW IS MY PRODUCT/SERVICE BETTER THAN COMPETITORS?
WHAT MAIN PAIN POINTS AM I SOLVING?
DO I HELP MY CLIENTS SAVE TIME OR MONEY? DO I HELP THEM BE MORE EFFICIENT OR REACH BIGGER GOALS? DO I HELP THEM OVERCOME A MAJOR CHALLENGE OR ISSUE?
MY MOST COMPELLING SELLING POINTS:
1-3 SENTENCES/HEADLINES I WOULD USE IN A FACEBOOK AD THAT SPEAK TO THE PAIN POINTS OF MY CLIENTS AND HOW MY OFFER PROVIDES THE SOLUTION

Hy # 4: Map Out Your New Offer

Inevitably, once you set a clear vision for your future, a wave of new ideas come rushing in!

With that unexpected wave, you may have felt a rush of excitement or you may have experienced a bit of anxiety or overwhelm. Either is perfectly natural and to be expected when something new begins developing and taking shape in your mind.

This next step will help you map out your new idea, determine if it's needed and/or wanted by a specific audience and what you'll need to make it work.

Take your time and explore this new idea *before* you spend time or money. The best way to predict the success of a new product or service is to validate need or want by asking a specific audience, evaluate the costs to create it, and having a clear picture of what it will take to create and sell it. So although you'll be tempted, don't skip these important steps in this section.

If a new idea didn't take shape for you, don't worry. As a creative and business owner, you can use this pages when a new idea strikes you in the future. Cuz we both know that happens all throughout the year!



WHAT PRODUCT OR SERVICE DO I WANT TO OFFER?
WHO IS THE IDEAL CLIENT FOR THIS OFFER?
HOW DOES THE OFFER HELP THEM AVOID PAIN OR EXPERIENCE PLEASURE? HOW WILL GETTING WHAT THEY WANT MAKE THEM FEEL? HOW WILL THIS OFFER MAKE THEM SEE THEMSELVES IN A NEW LIGHT?
WHAT REAL PROBLEM DOES THIS SOLVE FOR IDEAL CLIENT?
WHO IS ALREADY DELIVERING A SOLUTION TO MY IDEAL CLIENT AND HOW ARE THEY DOING THIS? WHO CAN I REACH OUT TO AND ASK ABOUT THIS NEW OFFER FROM PEOPLE WHO WOULD BUY IT?



WHO ARE MY TOP (3) COMPETITOTS?	WHAT ARE THEY OFFERING?	
WHAT ARE THEIR STRENGTHS	S AND WEAKNESSES?	
STRENGTHS	WEAKNESSES	
HOW ARE THEY REACHING TH	HEIR CUSTOMER?	
ARE THEY REACHING NEW CUSTOMERS THROUGH ADS, YOUTUBE CONTENT, BLOG POSTS ETC. HOW DID I FIND OUT ABOUT THEM?		
WHAT IS MY COMPETITOR CH	ARGING?	
THIS GIVES ME AN IDEA HOW MUCH YOU CAN/SHOULD CHAR	G E .	

#### New Product/Service

PRODUCT/SERVICE NAME:	
LIST OF FEATURES CUSTOMERS WANT:	LIST OF FEATURES COMPETITORS HAVE:
FEATURES COMPETITORS ARE LACKING:	BRAND NEW FEATURE IDEAS:
LIST OF FEATURES FOR MY PRODUCT/SERVICE:	OTHER NOTES & IDEAS:

## New Product/Service Matter

PRODUCT/SERVICE NAME:	
WHAT ARE MY ASSUMPTIONS REGARDING NEED/WANT:	IS SOMEONE ELSE OFFERING THIS PRODUCT/SERVICE?
WHO IS THE PERFECT CLIENT/CONSUMER?	WHAT QUESTIONS CAN I ASK MY IDEAL CUSTOMERS?
WHAT GROUPS CAN I TAP INTO TO TEST ASSUMPTIONS?	OTHER NOTES & IDEAS



NAME IDEA	IS THE URL AVAILABLE?		HOW MEMORABLE? (SCALE OF 1-10)
MAY CRAFTS CO.	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	YES	NO	
	NOTES:		



TO IMPLEMENT, I'LL NEED;		COST
	]	
	]	
	]	
	]	
	] . 1	



PRODUCT PRICING CALCULATOR		
HOURLY PRODUCTION WAGE*		
UNITS PRODUCED PER HOUR/IN TOTAL**		
TOTAL LABOR COST PER UNIT (HOURLY WAGE X UNITS PRODUCED)		
MATERIALS & PACKAGING COST PER UNIT		
SHIPPING COST PER UNIT		
OTHER COST PER UNIT		
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:		
PAYPAL CHECK		
STRIPE		
* The wage you will pay a contractor/employee or yourself  ** Either items produced per hour or how many hours it will take to finish one product		
NOTES:		



SERVICE PRICING	CALCULATOR	
HOURLY RATE*		
NUMBER OF HOURS TO COMPLETE PROJECT**		
NOMBER OF HOOKS TO COMPLETE PROJECT		
TOTAL LABOR COST PER UNIT (HOURLY WAGE X NUMBER OF CLIENTS)		
MATERIALS COST PER PROJECT		
EXPENSES (SUBSCRIPTIONS TO COMPLETE SERVICE)		
OTHER COSTS		
TOTAL UNIT COST (ALL OF THE ABOVE COMBINED)		
VALUE MARKUP (FOR 30% PUT 1.3 ETC)		
TOTAL SERVICE PRICE (TOTAL COST X MARKUP)		
METHODS OF GETTING PAID:		
PAYPAL	CHECK	
STRIPE		
* The rate you will pay a contractor/employee or yourself  ** Total number of hours it will take to complete project		
OTHER NO	TES:	

## WHAT IS Required

NEEDS	NICE OR NE	ECESSARY?	OTHER NOTES:
	YES	NO	
	YES	N O	
	YES	NO	

### NEW OFFER (health)

GENERAL	PRODUCT DEV.
VALIDATE PRODUCT/SERVICE OFFER	
FINANCIAL	SALES & MARKETING
FINANCIAL  D D D D D D D D D D D D D D D D D D	SALES & MARKETING
FINANCIAL  IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	SALES & MARKETING
FINANCIAL  D D D D D D D D D D D D D D D D D D	SALES & MARKETING

Step # 5: Project Your Future Gucks

If you've made it this far and worked through the four previous steps... CONGRATULATIONS!!

Here's some GREAT news - you've done the heavy lifting and hardest parts of business planning!

Now it's all about creating a plan so you can bring your vision to life by the end of this new year.

After you complete this step, you'll have a realistic picture of how you'll make the revenue you want by the end of the year.

A few words of caution: Don't project the future based on your past experiences. In other words, don't limit yourself when it comes to projecting the revenue you *want* to make by the end of this new year.

Dream big. Be bold. You totally got this!



# HIGH VALUE Company

NAME OF PRODUCT/SERVICE;	PRICE:	OTHER NOTES:
EXAMPLE: WEBSITE DESIGN	\$2900	BASIC PACKAGE

# Projected Business Market

NAME OF EXPENSE	COST	MONTHLY OR ANNUAL
TOTAL:		

# Where & How to

WHERE TO SELL PRODUCT ONLINE:		
ETSY	ONLINE RETAILERS	
AMAZON	SOCIAL MEDIA	
EBAY	WEBSITE	
STRATEGIC PARTNERS		
PHYSICAL PLACES TO SELL	PRODUCT:	
RETAIL STORE	PARTNER WITH A STORE	
POP-UP STORE		
CRAFT FAIRS & MARKETS		
SELL OUT OF HOME/CAR		
PRODUCT SELLING METHOD		
DIRECT TO CUSTOMER	AFFILIATE PROGRAM	
PARTNER WITH DISTRIBUTOR	REFERRAL PROGRAM	
PARTNER WITH A STORE		
PARTNER WITH A NON COMPETITOR		
OTHER NOTES:		

## Where & How to

WHERE TO SELL SERVICE ON	
WEBSITE	VIRTUAL EVENTS
SOCIAL MEDIA	GUEST BLOG OR PODCAST
LINKEDIN	
SOCIAL MEDIA GROUPS	
PHYSICAL PLACES TO SELL S	ERVICE:
SPEAKING EVENTS	
COMMUNITY EVENTS	
SERVICE SELLING METHODS	
DIRECT TO CLIENTS	COMPLIMENTARY CONSULTS
FREE OFFER	REFERRAL PARTNERS
AFFILIATE PROGRAM	DIGITAL ADVERTISING
STRATEGIC PARTNERS	
	NOTES:



MONTH	EST. REVENUE	EXPENSES	PROFIT
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			
JULY			
AUGUST			
SEPTEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			
TOTAL:			



MONTH	EST. REVENUE	EXPENSES	PROFIT
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			
JULY			
AUGUST			
SEPTEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			
TOTAL:			

Fly # 6: Your Kickass Action Man

So now that you've mapped out your offerings, revenue and business budget, it's time to create a *kickass* action plan so you stay committed and on track!

I'm going to let you in on a little secret first...

You do NOT have to know all of the steps or do the steps you outline perfectly. In other words, you can't mess this up :-).

Of course, creating a plan that includes smart action steps makes taking those actions *a lot easier* and makes the results come *a little quicker*.

But what really matters is that you *take action* (no matter how small) *every day* towards your big goals.

In this step, you'll create a plan by breaking those bigger goals into doable action steps. You do not have to map out *everything*, but it sure helps to define *what* you want to accomplish each month (bigger picture) and then break that bigger goal into smaller steps you can take each week.

The funny thing about planning is when you do it, you don't get derailed by drama, doubt and distractions that seem to surface every damn day. Instead, you'll stay highly focused and engaged in turning your vision into a tangible reality.



BIG PICTURE GOALS FOR EACH MONTH BEGIN WITH THE END IN MIND

YEAR:		
JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

## MARKETING Trategy

HOW YOU'LL PROMOTE AND SELL YOUR OFFERS

CHANNEL	MARKETING TACTICS	MONTHLY COST
PAID ADS		
C O N T E N T M A R K E T I N G		
SOCIAL MEDIA		
SEO		
LIVE EVENTS		
	TOTAL COST:	



BIG PICTURE MARKETING/SALES OBJECTIVES

YEAR:		
JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER



BREAKING DOWN BIG PICTURE MARKETING TACTICS INTO SMALLER ACTIONABLE STEPS FOR EACH WEEK OF THE MONTH

MONTH:	
WEEK 01	WEEK 02
WEEK 03	WEEK 04
WEEK 03	



PLAN THE WEEK AHEAD PRIORITIES TO MAKE CONSISTENT PROGRESS ON YOUR SMALLER WEEKLY ACTION STEPS

MONDAY	TUESDAY
WEDNESDAY	THURSDAY
FRIDAY	SATURDAY & SUNDAY
	NOTES:



MONDAY	TUESDAY
WEDNESDAY	THURSDAY
FRIDAY	SATURDAY & SUNDAY
	NOTES.
	NOTES:



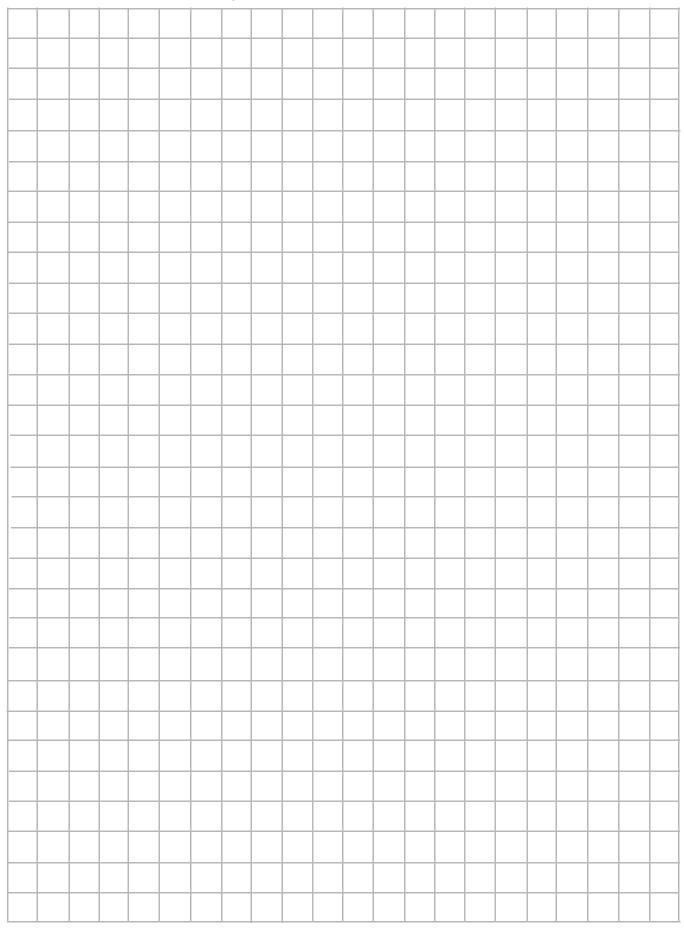
WEEK 03:	
MONDAY	TUESDAY
WEDNESDAY	THURSDAY
FRIDAY	SATURDAY & SUNDAY
	NOTES:



WEEK 04:	
MONDAY	TUESDAY
WEDNESDAY	THURSDAY
WEDNESDAY	THURSDAY
FRIDAY	SATURDAY & SUNDAY
	NOTES:

## Notepha





## KSB Online Marketing MORE THAN WORDS

Yay! You just did what most biz owners *never* do.

You got clear on your vision, created a plan and now you're are on a path to making it happen!

I celebrate YOU and your courage to do this work, take these steps and plan for your success!!

Thank you for allowing me to be a part of your business planning journey!

Keep me posted on how you're doing. Shoot me a <u>message</u> or email me at kelly@ksbonlinemarketing.com

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