

BIZPLANTASTIC

dream it.
plan it.
get it done.

about the author

i am a teacher. i love teaching strategies to micro biz owners, my goal is to make things just 'click' for you!

i am a designer. i love creating and sharing branded visual content and telling stories with images.

i am a brainstormer and an "unstucktor". i love coming up with new ideas for your biz and love to help you get unstuck, gain clarity, and find the fun in your biz again.

i have a blog called [build a little biz](#) where i focus on authentic branding & marketing strategies that make your biz SHINE. i want to help you be the lighthouse – stand tall, stand out, and be a beacon of light.

i have a husband, three small children, amazing friends and never enough time to do all the things that need to be done. (sound familiar?) i love tv, books, the beach, cold beer & great wine.

oh! one more thing. as you can see, i never use capitals when i write. i got tired of trying to make my writing fit what i thought everyone else thought it should be. i decided to just be me. i like being me.

i guess it is my own little way of questioning the rules and exerting some badassness in my life! i hope i can encourage you to do that too.

Karen ☺



about the workbook

step 1: print this workbook out! you will be brainstorming and jotting ideas and well.... planning! plus there are some great quotes to hang in your workspace, and of course some awesome planning sheets you will want to test out!

step 2: grab your favourite beverage (i say biz planning goes best with wine, but you might prefer a chai latte, it's totally your choice!) and some fancy pens or some rad tunes or the perfect secluded spot... whatever gets you feeling inspired. let's get it done!

getting started

i used to abhor the whole idea of a business plan because every time i read about creating a biz plan it was dry and boring and my eyes would go crossed and i would feel like my soul was being sucked out of me.

but one year i made a pledge to myself to do planning for the year (because i really wanted the year to be awesome, and i believe that if you want something awesome to happen you've got to do something awesome!) but i pledged to do planning my way – to make it fun and inspiring and pretty and useful and flexible.

i succeeded with that pledge and learned some really fabulous tips along the way and now planning + dreaming is one of my favourite biz activities! so i really want to share everything i learned, and all of the planning printables i created, with you!

my aim with this workbook is to provide:

- **flexibility.** your biz, your plans, your way. the ideas, tips, and printables included in this book are completely flexible and adaptable to you.
- **instruction.** because even though you are doing it your way, it helps to have some idea of where to start and what to do!
- **inspiration.** there is nothing worse than a dry, boring task. your business is awesome and planning for your biz should be just as awesome.

the best teachers do not just tell you what to do and then walk away. they involve you in your own learning, they inspire you, they spark ideas, and open a pathway to explore them. and that is exactly what i hope to do here.

this workbook will walk you through the steps you can take to create a flexible, awesome plan for your biz. we are simply going to start with the big picture and work our way down to the tasks you need to do to make that vision a reality:

reflection > vision > goals > strategies > plans > tasks

planning is not just something you do at the beginning of a year. you can start making plans whenever you want, and you can revisit your plans over and over. in fact you should!

work on plans at the beginning of the year, at the start of a new financial year, each quarter, each month, or just whenever you need to! you can even use these strategies to plan out one new thing for your biz. again, this is about what works for you!

because believing all the
dots will **CONNECT**
down the road will
give you the confidence to
FOLLOW your heart,
even if it finds you
off the well worn **PATH**.

steve jobs

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what is biz planning?

your business is a journey

everything you have done so far has led you to where you are right now. and you are exactly where you need to be!

but what is next? where are you going next? and why? and how will you get there? that is what your biz planning will help you with.

- **reflection** = the road so far; it's a look back at where you've been
- **vision** = clarity; it's the picture you have of where you are going & why
- **goals** = your intention; it's what you want
- **strategy** = the actions you take to get; it's what you do
- **plan** = the map you make; it's how you do it
- **tasks** = the little steps you take to get you there

imagine it this way...

you have a passion for art, for studying the famous painters of the world and seeing as many of the famous art pieces you can. you reflect on the art pieces you've seen so far, and the places you've been so far to learn about art. you think about how this passion has evolved, what you've learned, what you loved and didn't love. {*your reflection.*} you decide that what you really want to do is to go to paris. you want to stand in the louvre and be inspired and awed by the art that so far you have only seen in photos. {*your vision.*} you set the intention to be there by a certain date, to spend a certain amount of time there, to do it in a certain budget, and to see certain things while you are there. {*your goals.*} you take action and start saving money, you sell off some of your stuff, and you decide you will backpack and stay in hostels to save money. {*your strategies.*} you also map out your trip: the flights and trains you will take, the places you will stay, the stops you will make a long your way. {*your plans.*} every day you try to do one little thing from your to do list to help you reach those goals and get you closer to paris: you save all of your spare coins, you check the internet for deals on flights, you research hostels. {*your tasks.*} this is your journey. some of your goals might change (you might decide you really want more time – so you adjust your strategies and plans.) some of your strategies might change (you realize selling off stuff isn't going to get you enough money so you pick up a second job). some of your plans might change – even at the last minute! (one hostel is over booked when you get there so you grab your map and find a new one!) but you make it to paris, you stand in the louvre. and now you are ready to think about your next destination!

you are simply on a journey. your planning is simply meant to help you on that path.

your plan is simply
how you will turn your
VISION into **REALITY**
you don't have to
do it any one way,
you just have to **DO IT.**

karen gunton

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how to create your plans

this workbook includes a variety of printables that you can use & adapt to do your planning – and i will be suggesting which ones to use for the different parts of planning as well as giving you ideas for how to use them.

the reason i created these planners is because even with all of the online tools i am still a paper and pencil girl – i think there is something in the act of actually writing stuff down that makes it real. i also get giddy when i walk into a stationary store!

but the thing about stationary stores is that they don't have any *how to* – you see all the pretty paper and wonder how the heck you are going to actually make your plans.

i want this workbook to be like the stationary store + the instruction manual + the awesome inspiration all rolled into one!

here are some ideas for how you can create your plans:

- the printables are flexible so that you can use them in the way you wish – print the ones you like, add your own headings & customization, and leave the rest behind
- you can steal these ideas and make your own templates or printables
- you can grab a blank notebook and do all of your planning in there
- you can open up a word doc or a spread sheet and create your own templates for your plans
- you can use online apps or tools
- you can grab a white board & some markers
- you can paint your office wall as a giant black board
- you can stick post it notes all over a big sheet of poster board
- you can put all of your printables and plans into a 3 ring binder or spiral bind them
- you can stick them all on a pin board or magnetic board

this is all about doing biz planning in a way that works for you.

so while i will be making suggestions for the steps you can take to do your planning, it is completely up to you how you actually create your plans.

there is not a right way or a wrong way – there is just *your way!* and it may take you a few tries to find your way. that's fine! your plans are working documents... i make mine in pencil knowing i am going to change things quite a bit as time goes!

[click here for more planning inspiration over on pinterest](#)

REFLECTION:

looking **BACK**
so that the view
looking **FORWARD**
is even clearer

unknown

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REFLECTION

before we get down to work on new plans, it is a good idea to do some reflection on the *old* plans.

reflection is a look back at the road so far; where you've been and how you got here

whether you are working on plans for the new year, the new project you are starting, your new biz direction (or whatever it is you are planning next!) you can learn a lot by reflecting on what's happened so far.

(for instance when planning for a new year, reflect on the previous year. when planning out a launch for a new product, reflect on what you did with your previous product launches.)

reflection is not just about figuring out what went wrong, it's about celebrating everything that went right. never underestimate the power of celebration in your biz!

it's also about seeing what you can learn about YOU (your natural strengths and gifts, places you could learn more or get some assistance, how you want to spend your time, etc.)... the more you know about you, the more tools you have in your toolbelt to build the biz you want to build!

take some time to reflect, review, learn, evaluate, release, celebrate, release... and then start planning for what's next!

write a letter

write a letter (or a journal entry) about where you are right now. describe what your biz is like: what is working, what you would love to change, big successes you have had this year etc. (one year from now, or the next time you do a launch, or when you are next working on new plans it will be hard to remember what exactly things were like back then, so you will enjoy looking back on that letter!)

reflection questions

on the next page are some questions help you reflect. you can choose the just the ones that resonate for you, or you can answer them all... just jot down the first thing that comes to mind! you might be surprised as you see patterns start to emerge! you can even add some of your own questions specific to your biz or niche.

- what went well?
- what big thing(s) did you accomplish?
- what goals did you reach?
- what dreams came true?
- what are the highlights or the best memories?
-
- what didn't go as well as you'd hoped?
- what disappointed you?
- what was the hardest thing?
- what did you forget?
- what was the weak point?
-
- what lessons did you learn?
- what fears came up?
- what obstacles did you overcome?
- what did you learn about your customer, or feedback did you receive?
- what were your ah ha moments?
-
- what did you focus on?
- how did you spend most of your time?
- how did you feel most of the time?
- what made a difference to you?
- what themes came up again and again for you?
-
- what are you grateful for?
- what (or who) inspired you?
- what surprised you?
- what are you most proud of?
- what difference did you make to the lives of others?
-
- what do you want to change? stop? start?
- what do you need to let go of or forgive yourself (or others) for?
- what permission do you need to give yourself?
- what promise do you want to make to yourself?
- what's next for you?

try using the **to do list** to answer all these questions. or use the **6 blocks brainstorm** to reflect on 6 areas: what went well, what didn't go well, what you learned, where you spent your time, what you feel, and what's next.

my reflection

if you are working on
something **EXCITING**
that you really
CARE about, you don't
have to be pushed.
the **VISION** pulls you.

steve jobs

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VISION

before we can work out our business plans we need clarity around our business vision. don't let that word stop you in your tracks. some people see the word vision and think it is too woo (you mean i need to create a vision board?) and others think it is too strategic (you mean i need to know my 5 year plan for my biz?)

your vision is simply the big picture you have about where you are going and why.

your vision might include

- expanding your biz
- selling your biz
- global recognition
- winning awards
- travel
- living in a certain place
- working with certain people
- earning a certain amount of money
- spending your time in certain ways
- having a certain lifestyle
- establishing yourself as a thought leader or expert
- building a community
- starting a movement
- contributing to a charity or non profit
- paving the way for something else
- trying something new

i will admit that i do not have a specific 5 year plan for my biz. i do not know exactly what i want to be *doing* in 5 years. but i do know how i want to *feel*, i know the kind of person i want to *be*, and i know the *difference i want to make* in people's lives.

i actually find it much easier to set out my vision for one year, though you might want to work on a larger timeframe: 3 years, 5 years, 10 years.

or you might prefer to work with a shorter timeframe: 6 months, the rest of the year, or even just the timeframe for one project. it is up to you!

start with the timeframe that feels right for you, where you are at right now. later you can come back and do more brainstorming if you like.

here are some ideas for working out your biz vision for the year (or for whatever timeframe you are working with):

be. do. have. feel.

when thinking about your vision consider: who do you want to BE? what do you want to DO? what things do you want to HAVE? how do you want to FEEL?

note: it's nice to say that you want to "inspire people" but how do you actually want to spend your time? what things would actually help you to do that?

try using the **4 blocks brainstorm** to write down your be.do.have.feel. lists.

3 words

choose 1-3 words to represent your vision for the year ahead. (i like to choose 3 – i find that usually encompasses the variety of goals that i have. but i know many people who choose 1.) these words can be anything you want them to be – they are meant to symbolize your vision and act as both a filter and as guideposts for the rest of your goal setting & planning. print them out and put them by your workspace!

vision board

grab some magazines and photos to create a poster about your vision for the year (or project or whatever time frame you have.) or make a vision board using a secret board on pinterest. post your vision board so that you can be reminded of what you are working towards, and try to focus on how it will feel when you get there. (your thoughts and feelings about your vision are as important as the vision itself!)

write a letter

imagine yourself 1 year from now. what will your biz + life look like? what will you be doing? what will it feel like? write a letter or a journal entry as though it is that date in the future. describe it as though it was the perfect day. describe your vision in detail.

write an analogy

is there a person or brand that epitomizes the vision that you have for yourself or biz? what difference have they made in their industry? what do they exemplify? for example: "i want to be the ellen of sustainable parenting" (implying that you will bring to the table humour, and entertainment, and fun!)

i want to be the next _____.

i want to be the _____ of the _____.

i want to be to _____ what _____ is to _____.

my vision

CLARITY doesn't always mean you know exactly what you are **DOING**, it means you know exactly who you are **BEING** and **WHY**.

christine kane

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clarity

the “vision” stage of planning is all about clarity.

clarity is knowing who you are being and why

➔ your brand:

your brand is “who you are being” – it's the message you send to the world about “who” your biz is, what you want to be known for, the promise you make.

i always say that you need to be clear about *the business that you do* (your brand) so that you can rock *the way you do business* (your strategies and plans).

jot down the key things that make up the framework of your brand:

- your ideal **customer**
- the benefits of your **product**
- your point of difference in the **marketplace**
- **you:** your unique strengths, gifts, expertise, delivery etc.
- the **brand message** you wish to send to the world about your biz

➔ your why:

another way to get clarity is to start with why. simon senek says “people don't buy what you do, they buy why you do it”. so start with why and work from there:

- **why** you do = your cause, belief, core purpose, driving mission
- **how** you do = your unique gifts, zone of genius, secret sauce, point of difference
- **what** you do = your products, services, themes, topics, categories
- **where** you do = places you sell, how you deliver, where you connect with customers
- **who** you do it for = your ideal customer, your tribe or fandom

try using the **5 circles brainstorm** to jot down a few notes about your why and/or your brand. these make a great “one page snapshot” of your biz.

you are never too old
to set another

GOAL

or to dream a new

DREAM

C. S. Lewis

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GOALS

once you have set your vision for the year the next step is to work out specific goals that will help you to achieve that vision.

a goal is what exactly you want

types of goals

some goals you might consider

- **financial** goals = sales, pricing, profits
- **learning** goals = courses/books, subjects/topics, teachers
- **relationship** goals = mentors, peers, influencers, collaborators, biz bffs
- **community** goals = website traffic, subscribers/list building, social media followers
- **product** goals = adding something new, deleting something, launching
- **admin** goals = outsourcing, creating systems, hiring team members
- **next level** goals = revamping brand, trying something new, growth, evolution
- **you** goals = self-care, balance, space, mindset
- **life** goals = family, home, fitness/health, interests/activities

try using the **quarterly planner** to write down a goal for each of the above categories, or choose one of the other printables that matches the number of categories you wish to set goals for... you might just choose 3: biz, life, and self!

the big picture

try taking your big vision and breaking it down into goals that will help you reach that vision.

for example: if one of your vision words for the year is **voice**, some goals for achieving that could be starting a blog, being interviewed for a podcast, or speaking at an event.

alternatively – if you aren't clear about your vision but you already have some goals in mind, you can start with the goals, group them into a few chunks, and then come up with a word to represent the vision for each chunk.

for example: if your goals are to increase your prices, attract a new ideal customer, launch a new high level product, and be seen as a leader in your field... your vision word could be **premium**. the specific goals may change as the year goes on, but the vision would still be the same.

the **3x3 organizer** or the **3 circles brainstorm** are great for taking your 3 vision words and working out your goals for each.

get specific

once you have some goals in mind, the next step is to get specific about them! here are some things you might consider when describing your goals:

- **details** = what exactly do you want to achieve? be specific!
- **emotions** = imagine how it will feel when the goal is reality.
- **thoughts** = what "go to" mindsets do you have around this goal? be aware of these so that when they come up you can combat them!
- **intention** = set an intention or an ultimate purpose that you can focus on as you work towards the goal.
- **actions** = what actions will you need to take to achieve this goal? how are you going to make it happen?
- **accountability** = set a timeframe & declare it publicly (to your customers, your biz friends... once you tell people a date you are more likely to achieve it!)

try the **3x3 organizer** for this too: write one goal in the circle, use the top section to describe it in detail, use the smaller boxes on the right to list out all of the stuff you have to do, and use the 3 big boxes on the left for your thoughts/emotions/intentions. or try the **4 blocks** or **6 blocks brainstorm** sheets.

get smart

if some of those previous suggestions feel too woo for you, this method might feel like a better fit.

SMART goals are: specific, measureable, attainable, realistic, and timely. to get to the heart of your smart goal, try working out the 7 W's:

- **why** are you doing this? - your reasons, the benefits
- **who** can you get involved to help you?
- **what** requirements, restrictions, obstacles do you need to consider?
- **how** are you going to make it happen?
- **where** will you be making this happen?
- **when** it will happen? - deadlines, important dates
- **watch** – how will you track your progress, measure your success?

try adding the 7 Ws's as headings to the **week planner** then jot down your ideas for each.

go wild

you might have a few big goals for your biz, but it can be fun to come up with little goals too. try using the **100 day grid** to jot down as many fun little goals as you can! as you reach each one, cross it off the list.

my goals

INTENTION is
one of the most powerful
forces there is.
what you **MEAN** when
you do a thing
will always determine
the **OUTCOME**.

brenna yovanoff

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your purpose

i find with goal setting that it really helps to set a clear **intention**: something that i can keep in mind as i am working on my goal.

(for example if my goal is to double my newsletter subscribers i might set an intention of being extremely helpful!)

this is a big key to implementing successful strategies and plans as well. know your **purpose!** take the time to consider what exactly it is you wish to achieve with your strategy or plan. when you start with your purpose, and you keep it in mind as you work out your plans and tasks, your efforts will be much more effective.

here are some examples of different purposes you may have as you set goals, choose strategies, and make plans.

- demonstrate your expertise
- build social proof
- let people know they are not alone
- be helpful
- be generous
- make life easier, save time, ease frustration
- be more relatable - show that you have something in common with your people
- make people feel like they are not alone, that you 'get' them
- help people visualize themselves using your product/service
- ease an objection - a fear, concern, worry, hesitation, assumption
- create excitement, buzz, curiosity, or interest
- share a bit of your personal spark - your motivation or passion
- get people talking - start a conversation, encourage participation or engagement
- entertain people – something funny or fun or pretty or nice or fabulous
- offer incentive or motivation – a limited time offer, exclusivity, a referral incentive, a bonus
- to let people in – show your process, your inspiration, the unique way you do things, your talent
- to demonstrate benefits – get to the *why* of what you do, the reason it matters to people, the emotions involved
- to improve brand recognition

we have a
**STRATEGIC
PLAN**
it's called,
DOING THINGS

herb kelleher

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STRATEGIES

once you have set your goals, the next step is to work out which strategies will help you achieve those goals.

a strategy is what you do, it's an action that you take

the next few pages include a number of strategies you can use for your biz; including: **brand** strategies, **marketing** strategies, **sales** strategies, **product**, strategies, and **admin** strategies.

as you read through the pages consider which strategies will help with YOUR biz vision... your goals.

some might spark an idea, but it might not be the right time to implement – use the blank brainstorming sheets to note your ideas and come back to them.

some may not fit your biz at all, in which case, just ignore them!

remember, this is about flexible planning that will work for YOUR biz.

note:

if i am working on one goal i will use the **5 circles brainstorm** to jot down a few ideas about my strategies.

for example if a goal is to raise your prices you could jot down: which **products** are affected and the new price, as well any notes on changes to the products; ideas for evolving your **brand** to match the new prices; new **marketing** strategies to match the prices and reach the right customers; how your **sales** strategies might evolve to match the prices; and any notes on **admin** strategies that will help with this goal.

you could also use the **6 blocks brainstorm** – describe your goal in one box and work through your strategies in the others.

if you don't need to concern yourself with all 5 types of strategies, using one of the other printables. i sometimes just jot down ideas about branding/marketing/selling and will just use the **3 circles brainstorm**.

product strategy

depending on your biz you may have a wide variety of products, or you may have just one. the word "product" includes physical products, handmade products, digital products, services, expertise, information, time, packages...

your product is the thing you sell

if your goals involve earning money then you need products! but products can also help you with all of your goals. your product plans might drive your learning goals, may help you with goals to get PR or be integral to your goals to build relationships.

this is a good time to take stock of your products: look at what's working and what's not; what your audience seems to want more of; how you can add or alter your income streams; how your pricing is working for you; and how your products will help you achieve your goals.

another thing that can be helpful is to analyse & group your products to get a bigger picture of your strategy (this can show gaps that you can fill!) for instance:

high – medium – low
before – now – next
1:1 – 1:many – passive
physical product – service – information

here are some ideas for your product strategy:

- **physical product:** handmade, wholesale, consignment, drop-ship, distribute
- **e-products:** ebook, guide, report, pattern, blueprint, template, manifesto, workbook, checklist, course, instructions, plans, printables
- **technology products:** video tutorials, software, apps, templates, actions, plug ins, webinar, teleseminar, podcast, DVD
- **service:** 1:1 service, group service, online service, in-person service
- **expertise:** coaching, 1:1 consulting, email consults, subscription, workshops, sessions, classes, seminars, conventions, conferences, retreats, speaking gigs
- **group memberships:** club, forum, collective, mastermind, network, community, subscription
- **products/services from other businesses:** wholesale, affiliate products, commission a product made for you, commissions for referrals to other services, co-create a product with a complementary biz builder
- **advertising:** ads on website, newsletter, signature of emails, advertorials, sponsored posts, advertiser based ebook/guide, ad words

my product strategy

brand strategy

branding is communication. your brand is the message you send about your business – it is what you want to be known for, it is how you make people feel...

branding is who you are

your brand strategy is what you do to keep your brand front of mind and close to heart, and the keys to accomplishing that are **clarity, consistency, repetition, exaggeration & simplicity.**

here are some strategies for sharing your brand message:

- distinct, consistent visual branding across all platforms
- developing your brand voice and sharing your brand story through blogging, social media etc.
- having a few signature things that your brand is known for
- visual content such as video, social media shareables, infographics, printables, slide shows, etc
- branding your testimonials, product images, media kit, PDF content etc.
- a manifesto, creed or declaration that you share with your community
- building a community (a group, forum, network, mastermind) of people who care about the same things you do
- a promo page or fan club that lets your biggest, loyal fans be a part of your brand story
- an about me page that tells your brand story
- photographs that tell your brand story
- branding your newsletter – give it a name and a purpose that delights your customers
- creating themes for your facebook page, pinterest boards, instagram posts, twitter chats etc that match your brand
- using #hashtags that match your brand
- doing online events (eg google+ hangouts, facebook parties) or live events with your community around your brand themes

my brand strategy

marketing strategy

i know that many people experience negative feelings when it comes to marketing and it actually can be quite an intimidating prospect for many micro-biz builders. for some it feels like a scary, difficult or frustrating aspect of having a business; for others it is merely an unenjoyable chore.

but if you run a business, you need to sell your thing, you need to become a student of marketing. marketing is simply communication; it's the stuff you do to let people know about the thing you sell.

marketing is what you do.

the thing is, if you want your marketing to be effective you need to do the *right* stuff and target the *right* people, and make sure they know that *your* thing will meet their needs. that's where the brand clarity comes in. when all of these things work together, you can create a kick-ass marketing plan that is fun (yes i said it!) and effective.

there are a number of strategies you can add to your marketing plans:

- **customer love** – client retention, customer service, loyalty programs, friend referrals, word-of-mouth, testimonials
- **social media** – facebook, twitter, google+, pinterest, youtube, linked in, instagram
- **content** – your own blog, guest posts on other blogs, submitting articles to publications, video, podcasts,
- **opt-in list** – newsletters, email campaigns, subscriptions, online magazines or catalogues, VIP clubs, funnels for your products/offerings
- **relationships** – partnership, collaboration, co-creation, joint ventures, referrals, affiliates, recommendations
- **generosity** – giveaways, freebies, demos, free trials, tasters, samples, charitable donations, opt-in freebies
- **visibility** – ads, flyers, brochures, signs, goody bags, PR, parties, events
- **searches** – SEO, paid search, directories
- **images** – printables, sharables, testimonials, infographics, promotional, PDFs, media kits, multimedia, banners, manifesto, product images

my marketing strategy

sales strategy

selling is how you get your stuff into the hands of your customers. it doesn't have to be scary either! if you engage in branded marketing activities that feel authentic then you will be selling without even realizing it. selling is really just letting the people who want what you offer know that it is ready for them. selling is also communication: it's what you say (about your product, about your brand, about the sales process) to make people want to buy.

selling is what you say

your goal is really to make it easy, safe, comfortable, and enjoyable for them to buy from you.

there are a number of strategies you can use to sell your thing:

methods:

- website
- online marketplace – etsy, made-it, ebay
- stalls – markets, shows, fairs
- retail – wholesale, dropshipping, consignment, space rental
- affiliates, commissions
- agents, reps
- in person sales
- party plan/group sales
- catalogues
- franchises

tactics:

- urgency
- exclusivity
- upselling
- preselling
- bonuses
- limited editions
- one of a kind products
- subscriptions, clubs
- ongoing, delivery over time
- buy one, get one
- pay what you can
- bartering
- group buying
- fundraising incentives
- referral incentives
- frequent buyer incentives
- hostess incentives
- early bird incentives
- try it out first
- guarantees

my sales strategy

admin strategy

your admin strategy is what you do to run your biz, get the jobs done, take care of your biz and your customers, get your product out into the world.

admin is the way you do biz

depending on the type of business that you have: your business model, your product, the way you sell your product, the time and money you have... the strategies you implement to run your biz will be different.

here are some of the areas that may be included in running your biz:

- customer orders – processing, packaging, delivery, invoicing
- website maintenance
- correspondence – email management, managing phone calls
- finances – bookkeeping, accounting, payments in & out
- online marketing – blogging, newsletters, social media management, editorial calendar
- lead generation, advertising, sales funnel
- outsourcing, delegation, managing team, project management, staff training
- new client intake/screening, follow up with new clients/old clients/almost-clients, referrals/word of mouth, customer care, customer retention, collecting testimonials
- products – design & production process, program development, product creation, ordering stock, testing/reviews, launching
- visual marketing – photography, photo editing, photo uploading, image/visual content creation
- affiliate marketing – running your affiliate program, being an affiliate for other products

some strategies to help you run your biz:

- ➔ creating & implementing **systems**: working out processes, procedures, steps that will allow you to repeat the job efficiently, effectively, or consistently
- ➔ getting **organized** so that everything has a time, a place, and a system
- ➔ **outsourcing** jobs that are not the best use of your time or in your zone of genius
- ➔ **delegation** of jobs to team members, delegation of tasks to certain times/days
- ➔ **batching** jobs so that you do certain things all at once
- ➔ learning to use new **tools** or platforms that will help you get the jobs done more efficiently, effectively, or consistently
- ➔ creating **boundaries** or guidelines around what you will or won't do, what you say yes or no to, how you will respond to certain requests

my admin strategy

she turned her
CAN'TS into **CANS**
and her
DREAMS into **PLANS**

kobi yamada

karen gunton | buildalittlebiz.com

PLANNING

now that you have ideas in mind for the strategies you will include in your biz plans, the next step is to grab those goals and start planning out your year (or half-year or project or whatever. your choice!)

if the strategy is what you do, a plan is how you do it. it's your map

you can use the attached printables to look at your whole year, each month, and each week to start planning in your goals as well as working out what you will be selling and what marketing strategies you will need to use.

year calendar:

it really helps to have a full picture of your year before you start working on your specifics for each month or week.

grab the **year grid planner** or **year list planner**. or, if you want more space to write, use 4 x the **quarterly planner** – tape them together to create a large wall calendar.

if you prefer to do your year/month planning online, [google calendar](#) is an awesome tool. i like it because i can access it anywhere, anytime. colour code items for different aspects of your biz or different marketing strategies. you can use it in conjunction with the 'tasks' bar, you can even track daily sales in the same place.

- ➔ enter in any recurring activities as well as the one off activities you have planned for the year.
- ➔ add in your product promotions & launches – this gives you a big picture of what you will need to focus on each month
- ➔ look at your goals and add those into your timeline where necessary
- ➔ make note of holidays, special days, or fun events through the year – these can tie in nicely with marketing strategies!
- ➔ don't forget to add in any time off you know you will be needing – school holidays for instance can be a big interruption to regular biz activities

note: you may want to divide up your year calendar. for example, i divide mine into sections for: my monthly theme; the main thing i will be promoting/selling; the main thing i will be creating/developing; and any important events (things like school holidays, trips, conferences, anything that might affect my biz schedule).

monthly calendars:

once you have a picture of the full year, start creating calendars for each month. you may decide just to work on one month at a time or one quarter at a time... whatever works for you.

you can add the month title and dates to the **month grid planner** to create a monthly calendar.

if you would rather look at your month in weekly chunks (rather than working out each individual day) try the **month list planner**.

if you would rather look at each month as a whole (rather than working out each individual day or week) use the **quarterly planner**.

for your month:

- ➡ enter in launch dates, promotion dates, sale dates, special events or activities you will be involved in etc.
- ➡ consider coming up with a theme or focus for each month – something that ties in with the products/services you will be promoting. you can then apply the theme to your marketing strategies. your theme might come from the products themselves, from the seasons, from holidays or special events, etc.
- ➡ you can also use your calendar to work backward: enter in a launch date / sale date / goal date and then work backward to figure out the activities you need to do in advance

again – this needs to work for you! so choose the printables and methods that make sense for your biz!

weekly & daily plans

once you have your months mapped out the next step will be to figure out what you do each week and each day. this is where we start to get into the actual tasks – the “getting it done” part of planning!

you might decide to wait until closer to the start of each month or week to figure out your weekly & daily stuff, but blocking things into your calendar now allows you to see the big picture, stay organized, and start preparing in advance. you may even want to plan out your regular recurring weekly & daily activities!

more on this next...

my plans

some people **WANT**
it to happen,
some **WISH**
it would happen,
others **MAKE**
it happen.

michael jordan

karen gunton | buildalittlebiz.com

TASKS

the final step to the planning process is the whole “getting it done” thing. doing the actual tasks!

tasks are the little steps that make your plan come to life

this again is going to be very personal – we all have our own ways of managing tasks and to do lists and schedules. here are some ideas that might help:

weekly/daily

some people like to do a weekly to do list rather than a daily one, some people prefer a fresh to do list each day, some do a combination. totally up to you! these strategies can be used for either or both!

use the **week planner** to plan out your tasks for each day of the week. you can divide the week into categories, for example:

morning – afternoon – evening
biz – self – family
marketing – product work – admin

another thing you can do with the **week planner** is to block out time for the **regular repeated tasks** that you do. for example: sunday = schedule social media for the week. monday = email/admin. tuesday = blog & newsletter writing/scheduling, etc.

the **month grid planner** can be adapted to a weekly to do list: add the names of the days along one side and your task categories on the other (product, admin, social media, other marketing, etc.) then block out your week accordingly.

the **3x3 organizer** can become a weekly or daily to do list: use the top section to identify your focus or **most important task**, the 3 big blocks on the left can be for other regular categories (like blog, social media, newsletter) and the small blocks on the right can be for random stuff or notes to yourself.

or use the **to do list** or **to do grid** for your weekly or daily to do list. mind dump everything you need to get done in the week or the day and cross them off as you go! (i do this a lot! the to do grid is probably my most printed printable from this workbook!)

task management

it can be tough to get through an entire to do list and make sure you make the most of your time. here are some general task management tips that might help:

rocks-pebbles-sand

this is a cool method for getting stuff done: use the **3x3 organizer** - identify one big thing you want to do (your **rock**) and put it at the top. on the left add your **pebbles** into 3 categories (ex: biz, self, family) – this is the stuff that needs to get done, but is not urgent. use the right side for all of the **sand** – the little stuff you will fit in as you have time.

my 'sand' is all of the little things that pop up during the day/week. sometimes i will save them up and do them all in one go – or sometimes i fit them in when i have a few free minutes here and there. either way is generally faster than getting side tracked every time i think of something - if i write it down on my sand list i can get to it later.

now/later/one day

if you find that your mind is bouncing from thing to thing and you can't get focused, do a brain dump of everything you need to do. divide up the tasks into **do now - do later - do one day**.

the **3x3 organizer** can be helpful here or use the **3 circles brainstorm**. or as you are brain dumping, do it on post it notes and stick those on the **to do grid**. you can organize them in to categories and get them done!

this also works well when brainstorming marketing ideas, product ideas, sales ideas, ideas for the stuff you want to learn or try next... just get all of your ideas down on paper. then categorize them into priority. what makes sense to focus on right now? what can wait until later? put all of the "later stuff" aside and focus on the most important stuff – the stuff that will help you with your goals and plans.

the pomodoro technique

this is a technique where you set a timer and stay focussed on your task for a set amount of time. use the **3x3 organizer** or one of the brainstorm sheets to work out what you need to get done in each chunk of time. set your time for the allotted time (you know best how long you can realistically focus for – or try a time frame like 1 hour and see how it goes. adjust if necessary.) and then focus on that chunk of tasks until the timer rings. take a break then go back to your task list for another round.

project planning

in your goals you likely have a few big projects that you need to do. for example, create an ecourse, write a book, pitch an idea to a collaborator, hire a VA to implement a system, etc. here are some ideas for taking that one big thing and working out the exact steps to getting it done.

the brain dump

do a big brain dump of everything that comes to mind that you need to do to get this goal accomplished. small, big... everything. the reason this works is that once you get all of that on paper you can get organized and focus on getting it done. (without the brain dump your mind keeps saying: oh hey what about this? and oh yah don't forget that!)

you might like to use post it notes for this: once you have them written out you can move them around and organize them. or you can just write stuff down on the **to do list** or use one of the **brainstorm** printables, or draw your own mindmap... whatever works for you.

getting organized

once you have done all of your brainstorming or brain dumping, you need to organize it all into chunks of tasks, or categories so that it all feels doable. the **to do grid** is great for this (either write the tasks on the sheet or stick your post it notes in place). you can add headings to the rows and columns to keep organized.

for example, if i am creating an ecourse i will break up the columns into my modules and then each row is for objectives, key points, examples, homework. if i am working out the jobs i need to do to launch a new product i might have the headings be: pre-launch buzz, sales page to do, launch date to do etc.

i will also use the **3 circle brainstorm** to work out ideas for **branding-marketing-selling** as these often have a lot of cross-over. or i might brainstorm what i need to do **before-during-after**. i will even use this to jot down **questions-fears-obstacles**. these are all the buts that come up as i am working on a project – if i have a place to jot them down i can either solve them, or just let them go.

generally i end up with all sorts of printables with all sorts of info. the thing i like about using the printables is i can clip them all together into one handy **package** that i can access whenever i need to. before using the printables, i used to end up with lists here and brainstorms there and some stuff written down and other stuff just in my head. it was a mess to find anything!

one thing a day

this is a useful way of breaking up a big job into small doable chunks. for example, if your goal is to write a book you can set your one thing a day to be writing one chapter or section a day. or you can just take your project and divide it up into tasks and do one each day.

use the **31 days grid** for a month goal, or the **100 days grid** for a more long term goal.

work backwards

if you have set a time-frame or deadline for your project you can work backwards to get the job done. grab the **month grid planner** and enter in your launch date (or whatever is going to happen on the big day). work out each milestones before that date – if it is a launch date then you might have the launch period, the preselling, the times you will be doing marketing activities etc. you might also add in the dates you need to have certain things ready. (for example: for an ecourse launch i actually need the sales page ready before the course materials are! i can be marketing and selling before the ecourse is completely ready to go.)

create systems

as you are working out the process for tackling a project or achieving a goal you are actually creating something **repeatable**. for example once you have done one ecourse, or one launch, or one service delivery, you can repeat the process again and again. so, once you have finished the job take some time to write out a system. use the **to do grid** to write out a flow chart that describes your process or use one of the **brainstorm** sheets and include categories for the various tasks . include any notes to yourself for next time.

life planning

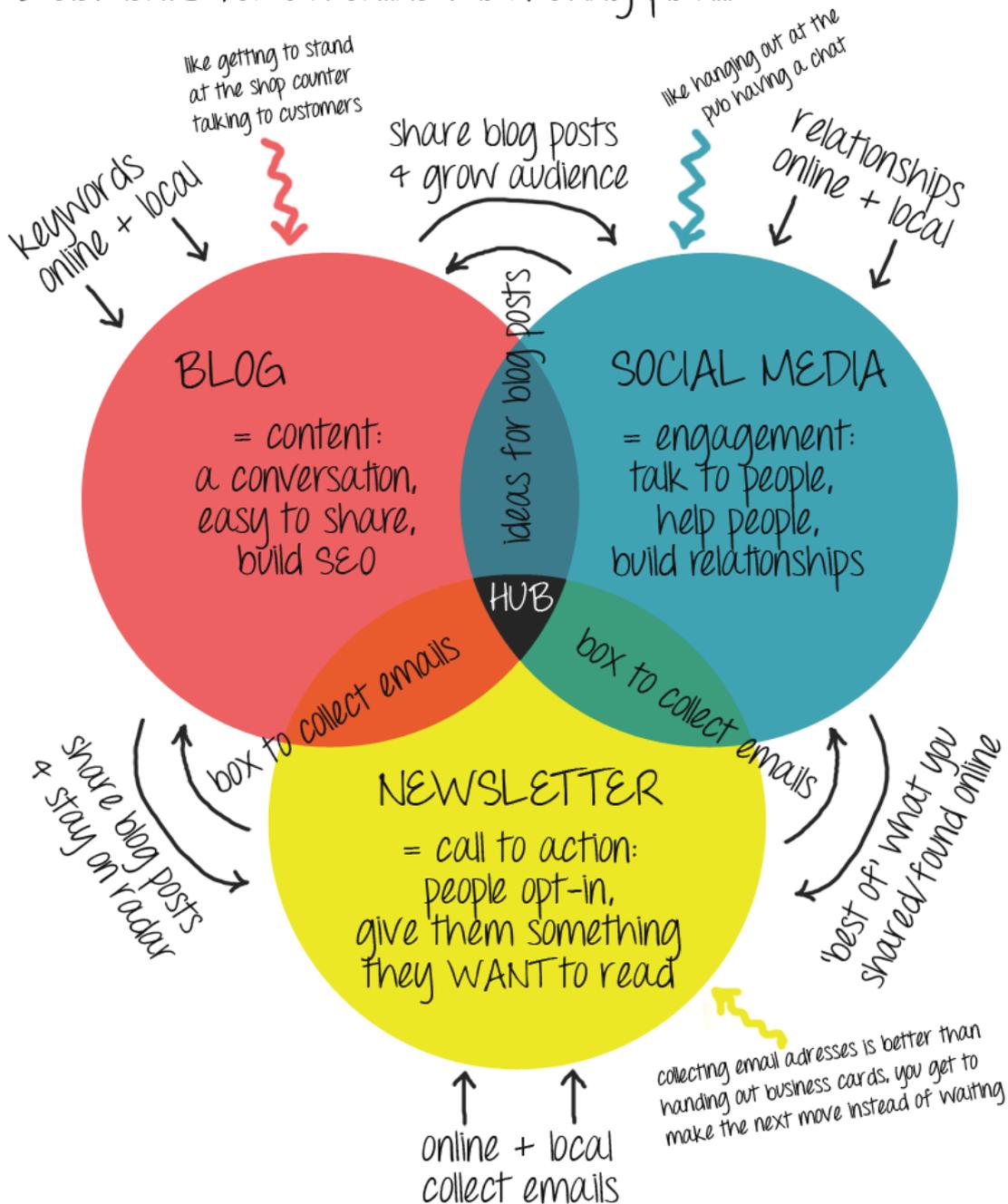
just a little side note here – these strategies and printables can be used for your non-biz life too. i use the **month grid planner** to work out a 5 week rotating meal plan and the **week planner** as the grocery shopping list for each of the weeks. my kids often use the **brainstorm** printables to do their homework. i've heard of people using the printables for planning out a holiday, or planning a party. again, do what works for you and make the strategies and printables fit your biz + life!

online marketing tasks

no matter what type of biz you have you are likely using social media as part of your marketing strategy and hopefully you are using blogging & email newsletters as well – i highly recommend these 3 things for your basic online marketing strategy.

you can use what you do in one location to drive the content for the other platforms – you don't need to do something fresh for each thing! they are all inter-linked. here is what my online marketing plan looks like:

3 elements for an online marketing plan...



editorial calendar

an editorial calendar can help you manage these 3 things or any other type of content you produce to market your biz – for example: perhaps you put out weekly flyers, monthly catalogues, or seasonal look books.

to create your editorial calendar, go back to your year plan: use your themes (or your product promotions or launches) to drive your online content marketing.

i publish a blog post once a week and send a newsletter once a week – so i use the **month list planner** for my editorial calendar. i have a theme related to the main product that i am promoting that month and come up with 3-5 weekly **blog posts** (depending on the promotion period) that support the theme. i brainstorm **social media** posts for each week that fit with the blog posts, and then i plan out the content for the **newsletter** to support the blog post. and that is my month editorial calendar done!

if you publish content more often or less often you might want to use one of the other printables. do what works for your biz!

content plans

when writing content for a blog post or a newsletter (or any other content you need to create) try:

the **3x3 organizer** - describe the topic or the problem you want to solve in the main box at the top. on the left side, pick 3 main points to address the problem. then jot down 3 supporting points for each main point. that becomes the outline you're your content.

the **list things organizer** – put your topic in the top circle and try putting the main question about that topic and your answer on either side. then list the points that support your answer in the boxes below. or you could use this space to list each of your points and an example for each. or you could go back & forth: if you are struggling with this, try this. use the bottom box for your final take home message or your call to action.

the **3 things organizer** – this works really well for creating a format that you will repeat in each blogpost or newsletter (or a course module or product flyer!) use the top for your topic or the problem you want to solve. the 3 big boxes are for your 3 main content sections – for example: provide information, show an example, give people an exercise to do themselves. or: the introduction, your main points, and the conclusion. or: describe the product, explain how it works, demonstrate the benefits of using it. use the bottom box for your final take home message or your call to action.

social media plans

for social media content try using the **week planner** to work out a week's worth of social media ideas. it can help to have a **rhythm** to your week (example: money monday, tuesday tunes, work it out wednesday, etc.)

it also helps to have a variety of **content types** to use for social media (for example: a question, a quote, a fill in the blank, a handy tip, a helpful link, etc.) use the **to do grid** or **month grid** to come up with a variety of posts to choose from of each content type.

or use the **month grid planner** to create a week's worth of posts for a variety of social platforms by putting headings for the days of the week along the top and the platforms you use along the side. slot in the content you will share each day on each platform so that you don't have to think of things on the spot.

marketing plans

try using the **quarterly planner** to work out what you need for your marketing plans. in the first column write down **what** product/service you want to promote. in the next column write down **how** you plan to market it (any ideas you have), and in the final column write down what you **need** in order to make it happen: for instance you might need to create visuals, or you might need swipe copy for your affiliates, or you might need to email some bloggers with review info.

if you have a system that you use for every promotion, every product launch, or that you simply repeat every month use the **to do grid** or one of the brainstorm sheets to create a **checklist** for yourself. for example: every time i launch a new workbook or workshop i do the following things - create a variety of shareable images for social media; write related blog posts & newsletter content; email affiliates with swipe copy/images; email subscribers with launch promo offer.

if you are feeling stuck for marketing or sales ideas grab the **100 day grid** and brainstorm 100 ideas for getting the word out about your thing – just let your brain flow, don't worry if any of the ideas are lame or not very doable. the idea is that as you let the ideas flow more will start coming! at the end you can choose the most solid, doable ideas from the list.

delegation

the ideas listed here can help you get organized to outsource or delegate as well. use the printables to create your systems and/or to break down your strategies into doable tasks. you can then use them to walk someone else (a team member, a VA, a social media manager etc.) through the tasks that you want them to do for you. your printables and planners become your manuals!

my tasks

if you want something

AWESOME

to happen,

you need to **DO**

something

AWESOME

karen gunton

karen gunton | buildalittlebiz.com

FINAL TIPS

tracking

once you have a plan in place, the key is to track it!

i once heard a tip that i will never forget: **make the first task you do each day be related to making money** – so start each day by looking at your plans and doing the marketing & sales tasks you have planned. at the end of the day go back and write the sales & profits for the day right on your planning sheet or use the **31 day grid** to track your daily sales.

tracking can also be done to **chart the progress of a goal or measure the success of a particular strategy** – you might want to track website stats, fan numbers, newsletter opens, comments, etc. you don't just have to track numbers you can also track qualitative feedback – jot down comments & tweets about a topic, or jot down your own thoughts on how your progress is going!

again you can do this right on your existing plans (the backs of pages make a great spot to jot down your thoughts or results) or you can keep a biz journal that you write a note or two in each night.

however you decide to track your progress – it can be a very important part of achieving your goals and realizing your vision. celebrate your success and tweak your plans as you learn what works and what doesn't.

it's not a tattoo

your plans are a work in progress, so don't be afraid to change them along the way or to change the way you make them. your biz, your plans, your way.

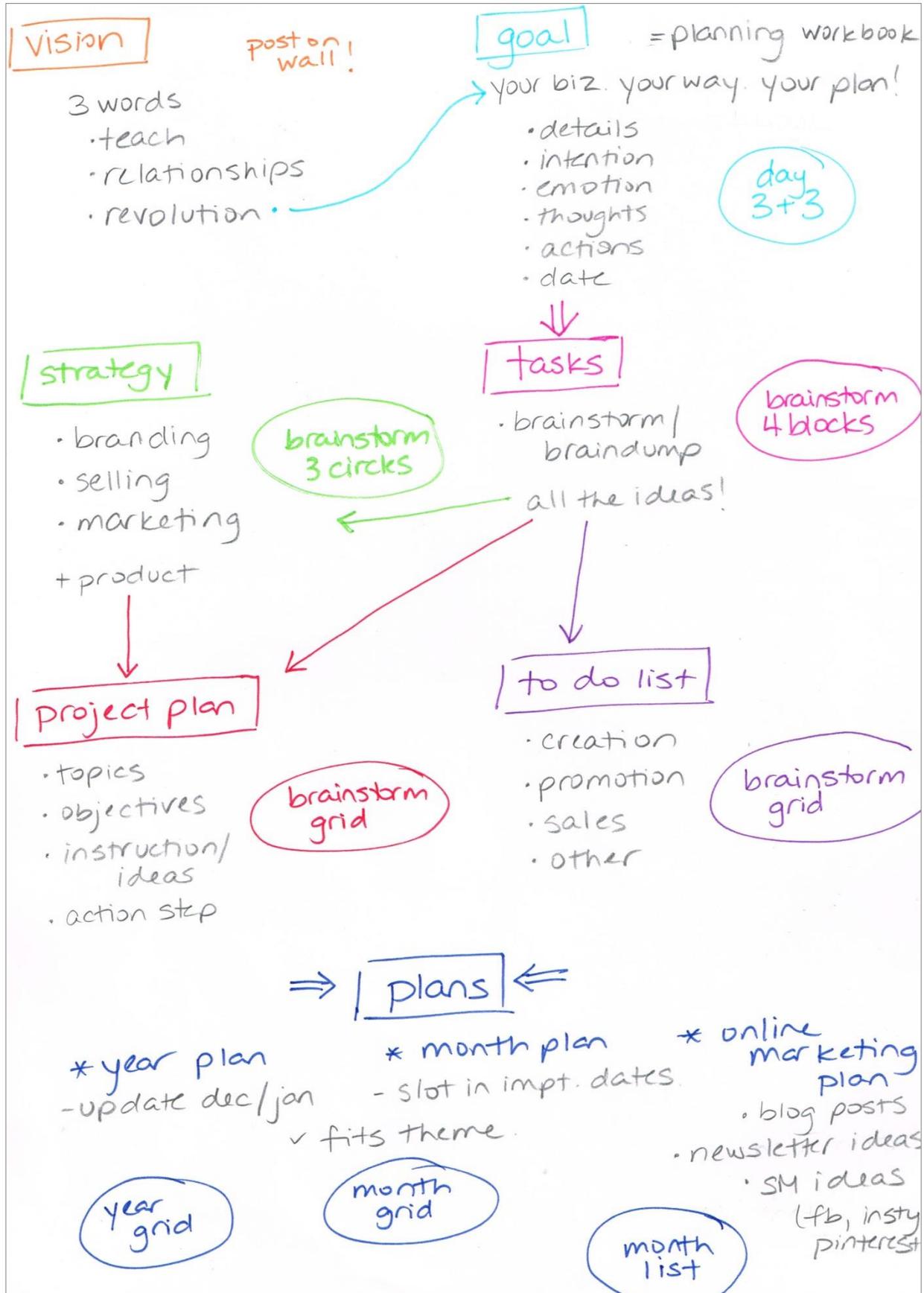
if you are the type to plan things down to the nth degree, don't be afraid to get things out before you are ready. **done is better than perfect!** you can learn and improve as you go. but you won't reach the goal if you spend all your time planning and none of it doing!

and if you are the type to not do much planning at all – to just fly by the seat of your pants – i encourage you to try some of these ideas and make them your own. a dream without a plan is just a wish! and i really want to see your dreams happen.

lastly don't be afraid to leave **space** in your plans for wherever the universe leads you. if you've got a clear vision and set some great goals, you just might be surprised at the path you take to achieve them. i know i have been!!

now, go be bizplantastic. =)

as an example, here is the exact process i went through to plan this workbook, from vision to getting it done...



the most
EFFECTIVE
way to do it is
TO DO IT.

amelia earhart

karen gunton | buildalittlebiz.com

THE PRINTABLES

- #1. [year grid planner](#)
- #2. [year list planner](#)
- #3. [quarterly planner](#)
- #4. [month grid planner](#)
- #5. [month list planner](#)
- #6. [week list planner](#)
- #7. [4 blocks brainstorm](#)
- #8. [6 blocks brainstorm](#)
- #9. [3 circles brainstorm](#)
- #10. [5 circles brainstorm](#)
- #11. [to do list](#)
- #12. [to do grid](#)
- #13. [31 day grid](#)
- #14. [100 day grid](#)
- #15. [3x3 organizer](#)
- #16. [3 things organizer](#)
- #17. [list organizer](#)

note:

you might use all of these or you might just use a few!

you might want to work out what you need and get a stack printed all at once, or just print these as you need them. you might put them in a binder, get them bound, save and use them online, or stick them on your wall.

the titles above are linked to single pdfs if you would like to access (and save!) them individually without printing them all from this workbook – it may be more handy that way.

if you would like to make the pdf's editable (to add your own headings or to fill them out online) use [cute pdf editor](#) (free) or adobe acrobat if you have it.

if you are going to print out a stack at once, have a look and plan out what you need. likely: 1 year plan, 12 month plans, & 52 week plans. but you may also want extra month or week plans for your editorial calendar, brainstorming sheets for your projects or blog posts or goal setting, tracking sheets for each month – again it depends on you!

january

february

march

april

may

june

july

august

september

october

november

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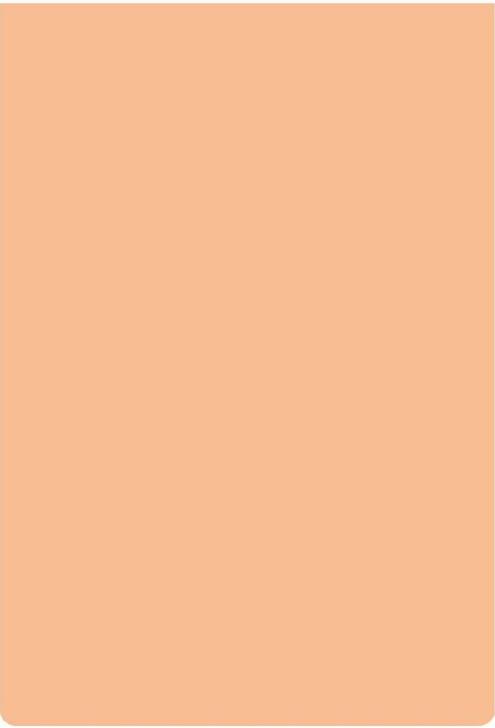
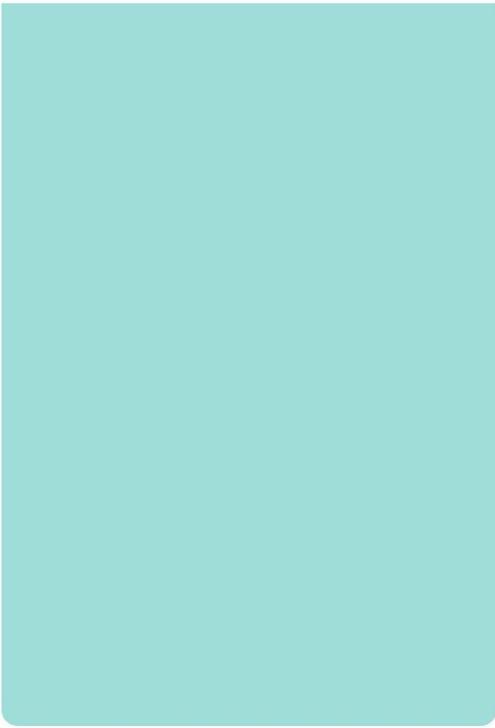
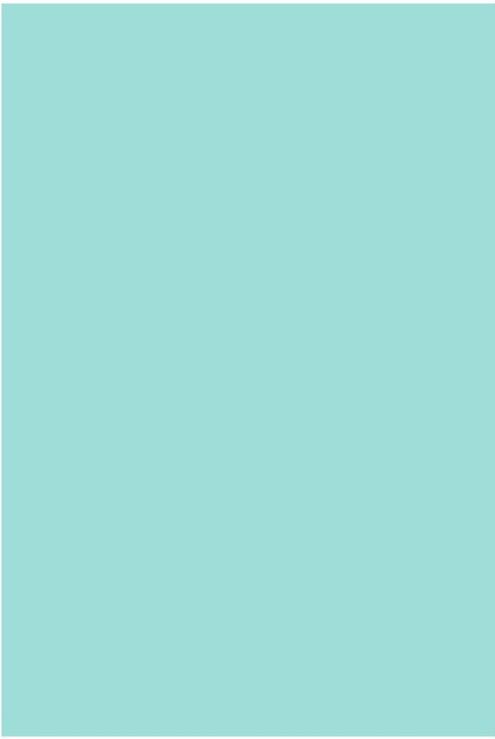
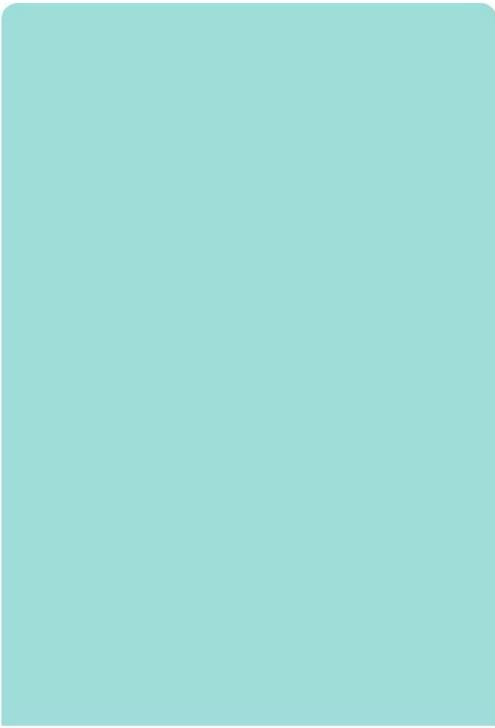
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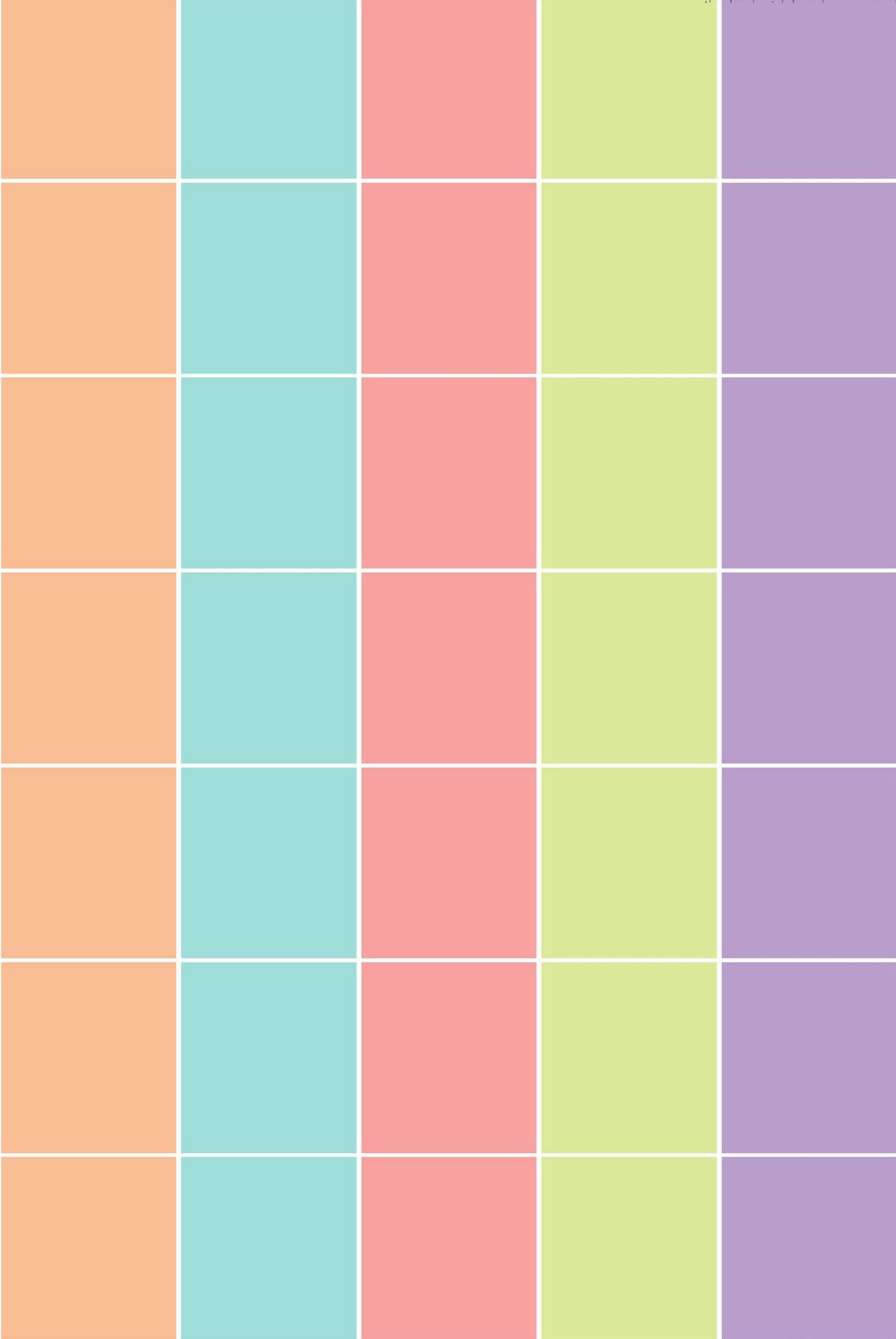
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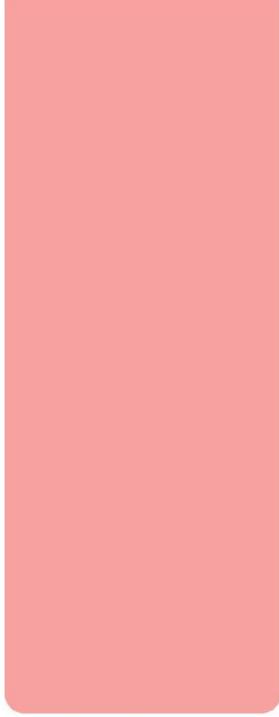
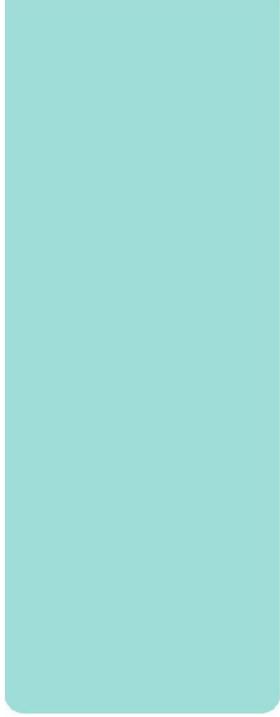
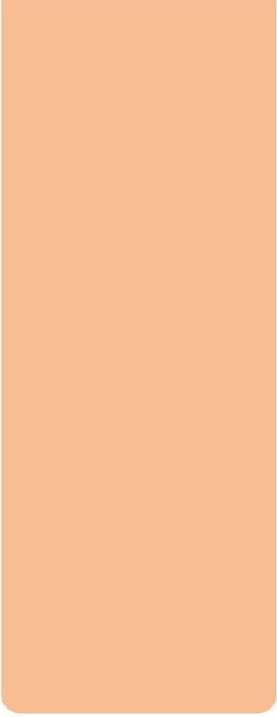
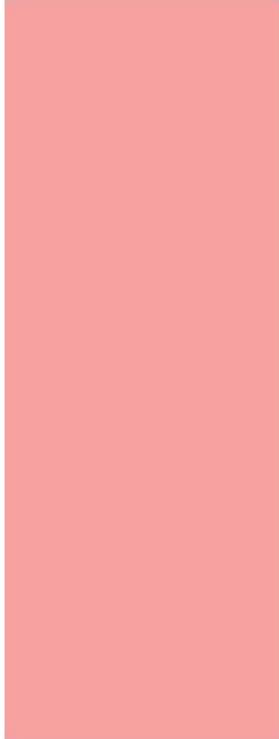
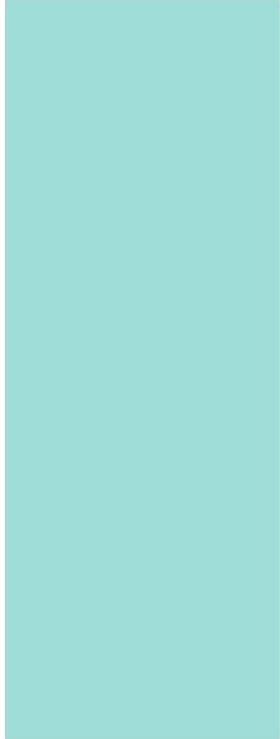
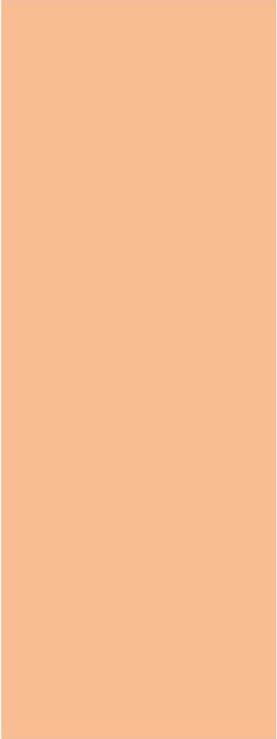
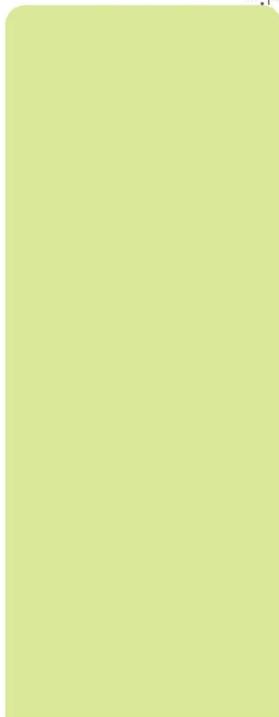
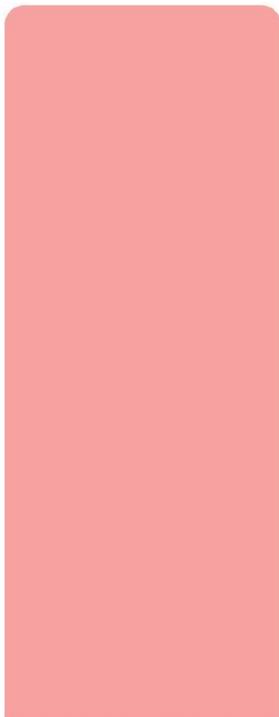
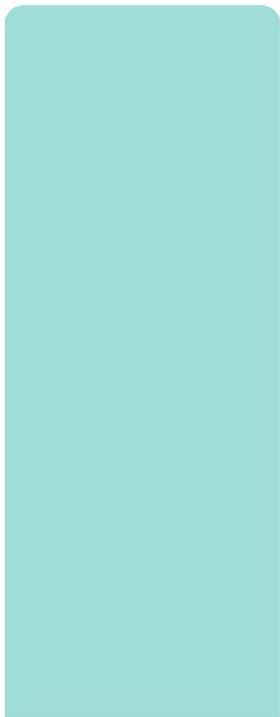
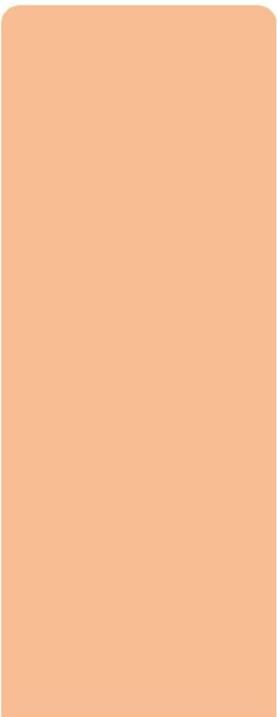
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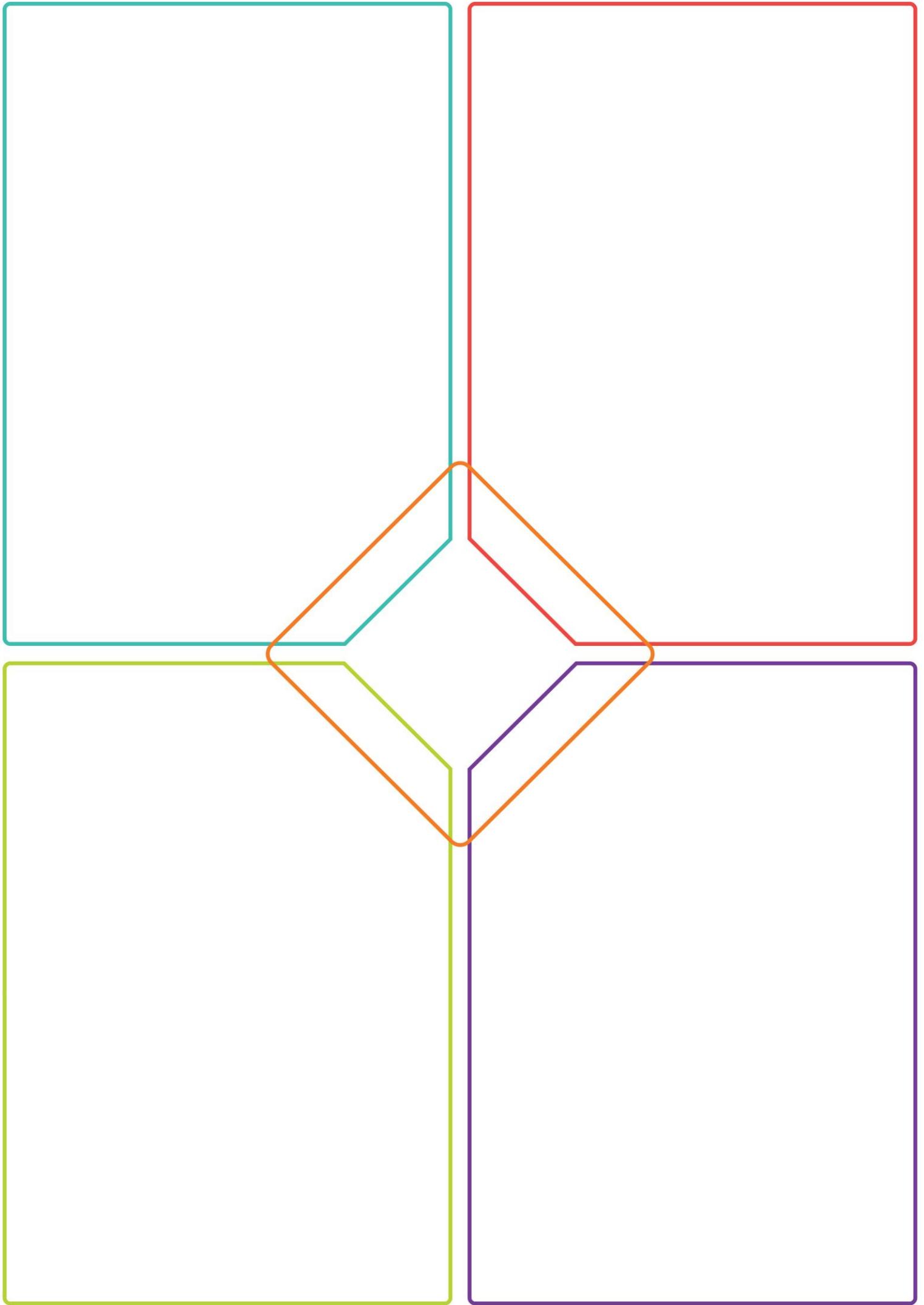
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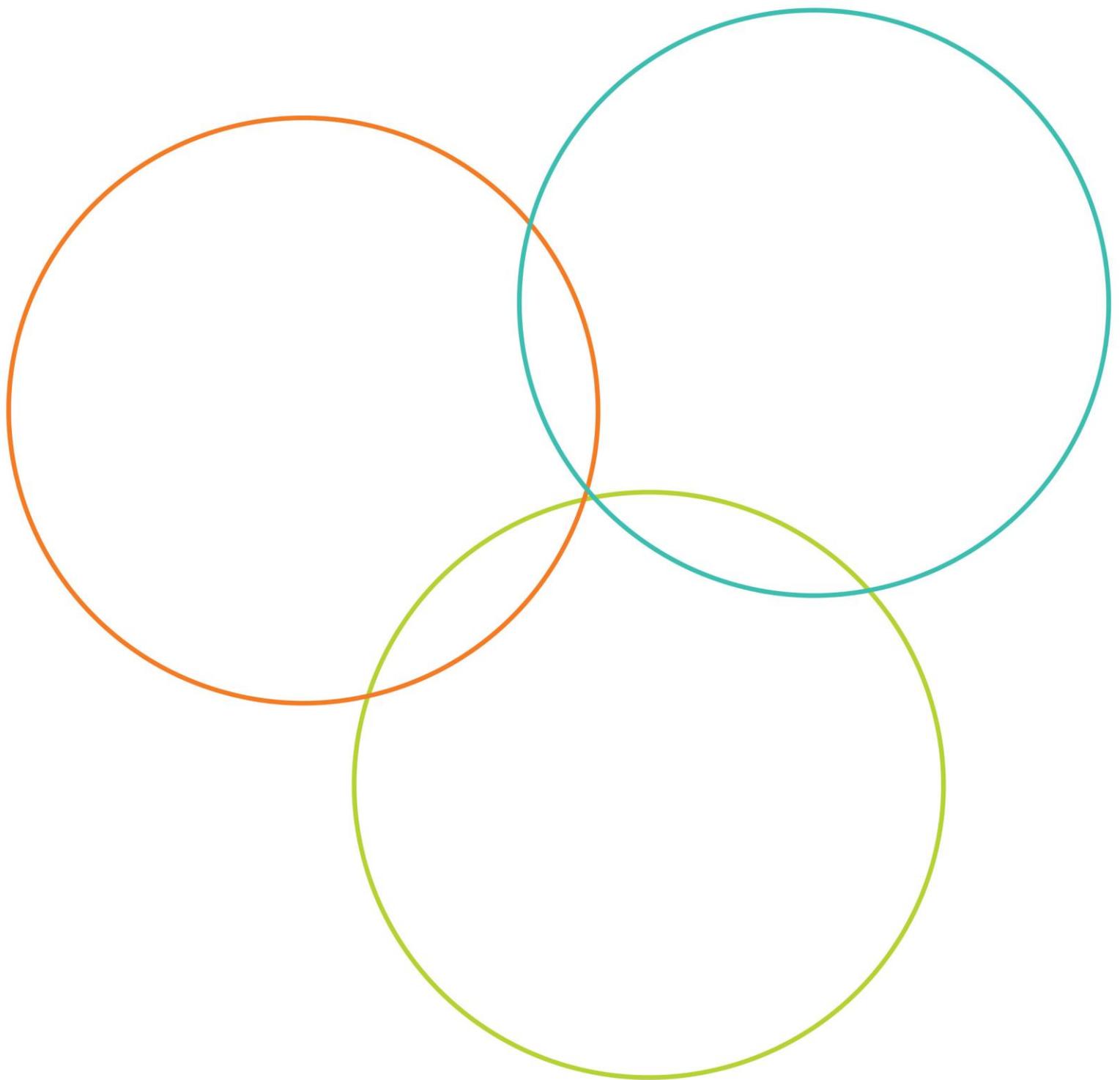
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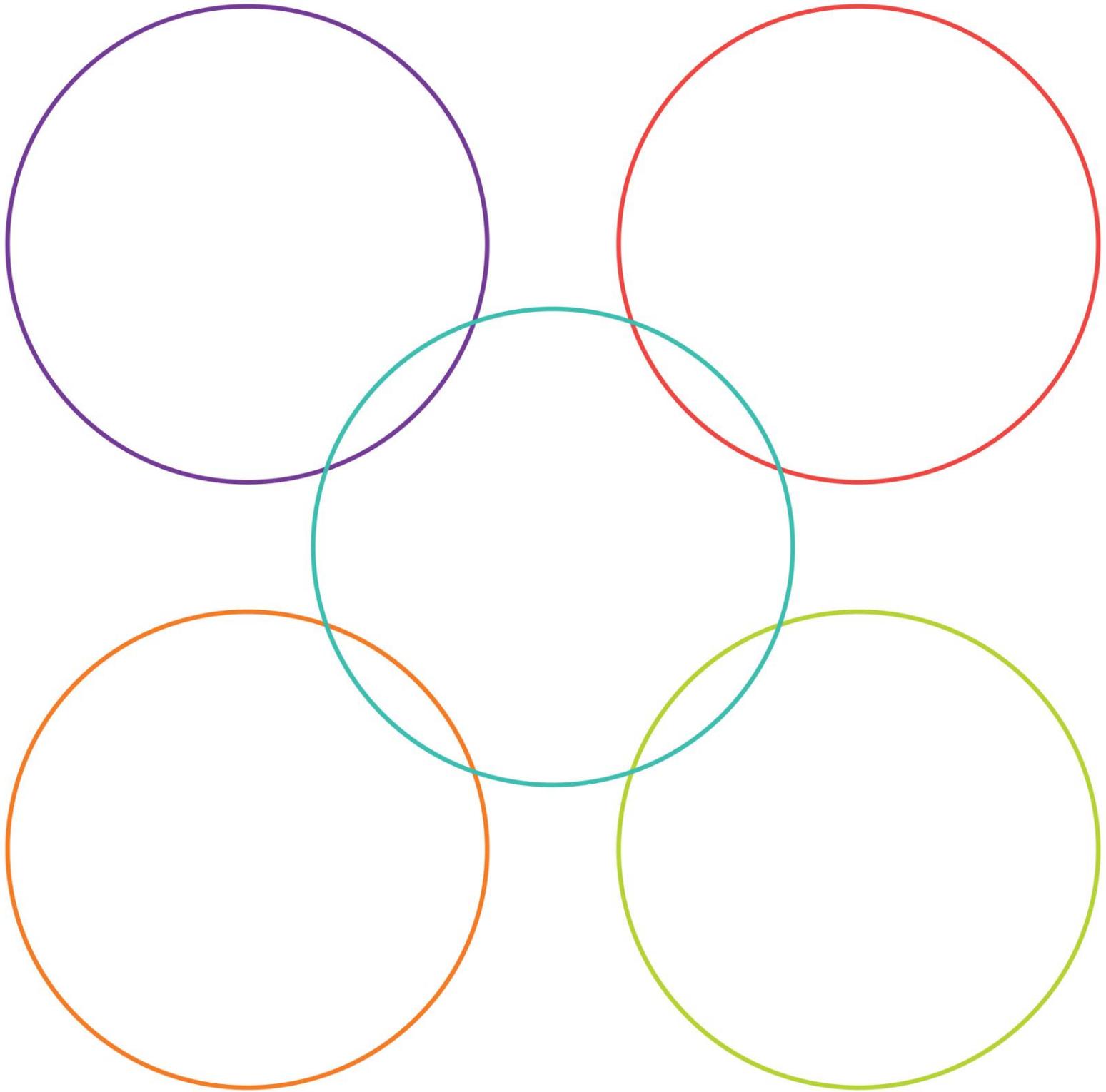
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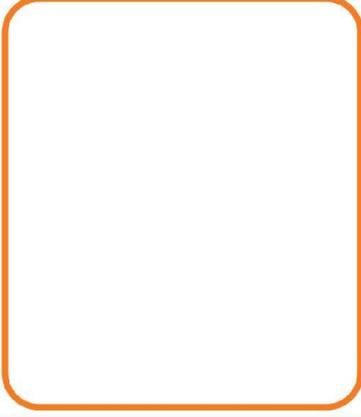
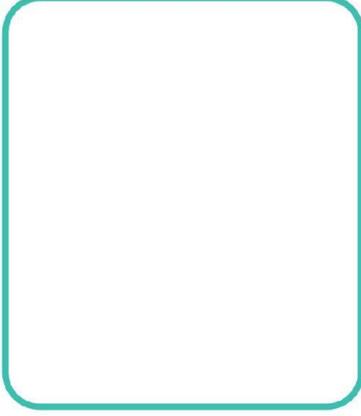
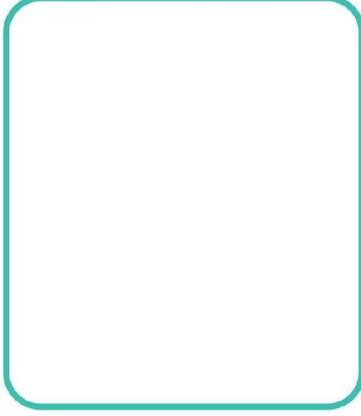
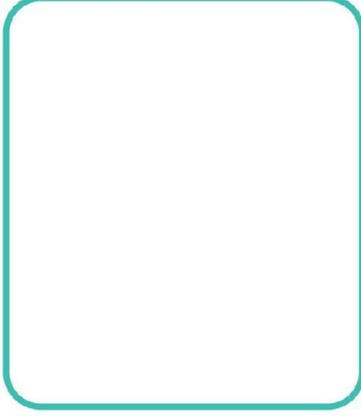
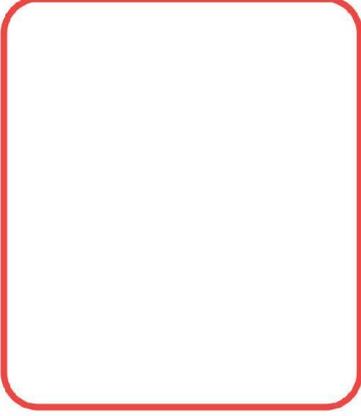
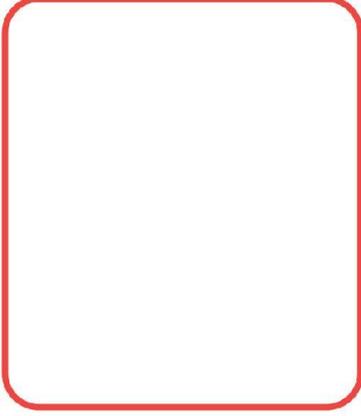
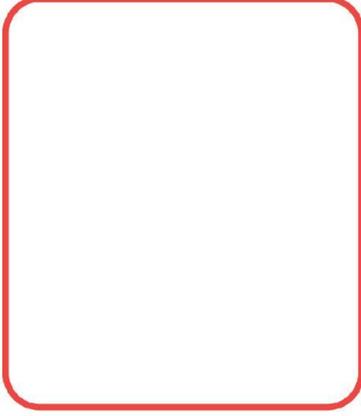
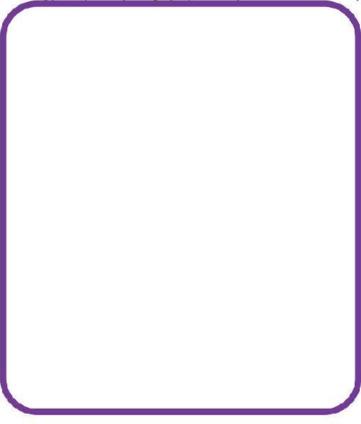
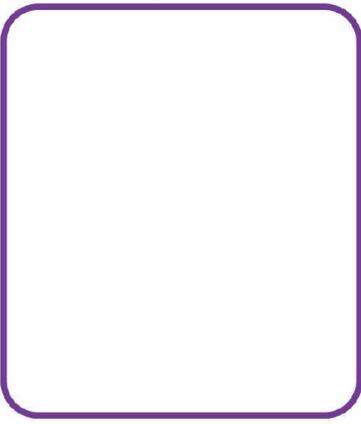
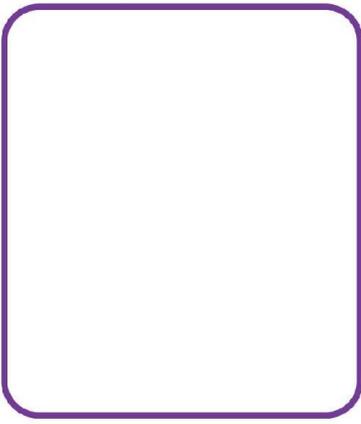
A teal-outlined sticky note template. It features a rounded rectangular header bar at the top and a larger rectangular body below it, both with rounded corners.An orange-outlined sticky note template. It features a rounded rectangular header bar at the top and a larger rectangular body below it, both with rounded corners.A red-outlined sticky note template. It features a rounded rectangular header bar at the top and a larger rectangular body below it, both with rounded corners.A purple-outlined sticky note template. It features a rounded rectangular header bar at the top and a larger rectangular body below it, both with rounded corners.A light orange-outlined sticky note template. It features a rounded rectangular header bar at the top and a larger rectangular body below it, both with rounded corners.A light green-outlined sticky note template. It features a rounded rectangular header bar at the top and a larger rectangular body below it, both with rounded corners.





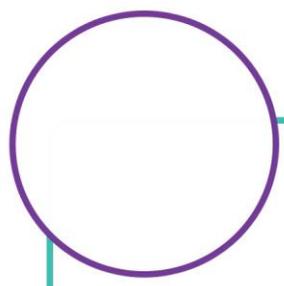
15 rows of horizontal lines for writing, each preceded by a colored circle. The colors of the circles and lines are: teal, lime green, orange, red, purple, teal, lime green, orange, red, purple, teal, lime green, orange, red, purple.

15 rows of horizontal lines for writing, each preceded by a colored circle. The colors of the circles and lines are: teal, lime green, orange, red, purple, teal, lime green, orange, red, purple, teal, lime green, orange, red, purple.



1	17
2	18
3	19
4	20
5	21
6	22
7	23
8	24
9	25
10	26
11	27
12	28
13	29
14	30
15	31
16	total

1	21	41	61	81
2	22	42	62	82
3	23	43	63	83
4	24	44	64	84
5	25	45	64	85
6	26	46	66	86
7	27	47	67	87
8	28	48	68	88
9	29	48	69	89
10	30	50	70	90
11	31	51	71	91
12	32	52	72	92
13	33	53	73	93
14	34	54	74	94
15	35	55	75	95
16	36	56	76	96
17	37	57	77	97
18	38	58	78	98
19	39	59	79	99
20	40	60	80	100



A large teal rounded rectangular box at the top of the page.

A large orange rounded rectangular box on the left side of the page.

A red rounded rectangular box on the right side of the page.

A red rounded rectangular box on the right side of the page.

A red rounded rectangular box on the right side of the page.

A large orange rounded rectangular box on the left side of the page.

A lime green rounded rectangular box on the right side of the page.

A lime green rounded rectangular box on the right side of the page.

A lime green rounded rectangular box on the right side of the page.

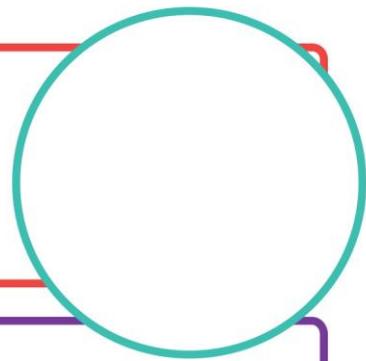
A large orange rounded rectangular box on the left side of the page.

A purple rounded rectangular box on the right side of the page.

A purple rounded rectangular box on the right side of the page.

A purple rounded rectangular box on the right side of the page.

Red rectangular box



Purple rectangular box

Light green rectangular box

Orange rectangular box

Teal rectangular box

