

ENTREENGAGE!

BUSINESS PLANNING ROADMAP

BUSINESS NAME:

CLICK HERE
FOR MORE
WORKSHEETS
& RESOURCES



MY BUSINESS PLANNER

TOP 10 PRIORITIES

BUSINESS OVERVIEW	TARGET CUSTOMER MARKET	LONG TERM GOALS
BUSINESS GOALS	GOAL ACTION PLAN	PRODUCT PLANNER
PACKAGING PLANNER	COMPETITOR ANALYSIS	SEASONAL TRENDS

BUSINESS PLANNING

DAILY PLANNER	WEEKLY PLANNER	MONTHLY PLANNER
QUARTERLY PLANNER	ANNUAL PLANNER	TO DO TASK LIST

BUSINESS TRACKERS

ORDER TRACKER	PRODUCT INVENTORY	ANNUAL PROFIT TRACKER
MONTHLY SALES TRACKER	SHIPPING TRACKER	SUPPLIES TRACKER
RETURNS TRACKER	ADVERTISING TRACKER	DISCOUNT TRACKER
PACKAGING SUPPLIES	SUPPLIER LIST	CONTACTS LIST (CRM)

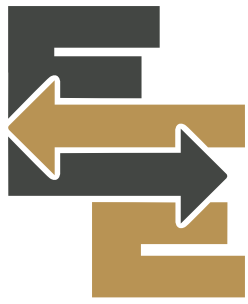
BUSINESS FINANCES

ANNUAL FINANCES	INCOME TRACKER	EXPENSE TRACKER
BILLS TRACKER	TAX DEDUCTIONS	MONTHLY FINANCES

SOCIAL MEDIA MARKETING

MONTHLY SOCIALS PLANNER	SOCIAL MEDIA PLANNER	WEEKLY PLANNER
SOCIAL MEDIA STATS	CAMPAIGN MANAGER	GIVEAWAY MANAGER
CONTENT IDEAS	FOLLOWER GROWTH	HASHTAG RESEARCH





ENTREENGAGE!

BUSINESS GOALS

BUSINESS NAME:

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BUSINESS OVERVIEW

YEAR:

MY BUSINESS SUMMARY

BUSINESS NAME:

BUSINESS DETAILS

WEBSITE:

LAUNCH DATE:

OWNER:

EMAIL:

PHONE:

LOCATION:

SOCIAL MEDIA HANDLES

INSTAGRAM

TIKTOK

FACEBOOK

TWITTER

PINTEREST

LINKEDIN

YOUTUBE

OTHER:

MISSION STATEMENT

STRENGTHS

WEAKNESSES

SWOT ANALYSIS

OPPORTUNITIES

THREATS


VALUES

VISION



TARGET CUSTOMER MARKET

IDENTIFYING OUR CUSTOMER AVATARS


NAME

SOCIAL MEDIA HANDLES
GENDER
AGE RANGE
MARITAL STATUS
OCCUPATION
ANNUAL INCOME
LOCATION

GOALS	VALUES

CHALLENGES

INTERESTS

MY IDEAL CUSTOMER	
-------------------	--

WHO I WANT TO HELP?

WHY THEY ARE IDEAL?

WHAT CAN YOU UNIQUELY OFFER YOUR IDEAL CUSTOMER?
--



LONG TERM BUSINESS GOALS

SETTING UP THE LONG TERM VISION FOR THE BUSINESS

1 YEAR GOALS

ACTION STEPS

3 YEAR GOALS

ACTION STEPS

5 YEAR GOALS

ACTION STEPS

10 YEAR GOALS

ACTION STEPS



BUSINESS GOALS

THE GOALS FOR OUR BUSINESS ON ONE PAGE

YEAR:

GOAL

WHY IT'S
IMPORTANT?

DESIRED
OUTCOME

ACTION STEPS

1

2

3

4

5

GOAL

WHY IT'S
IMPORTANT?

DESIRED
OUTCOME

ACTION STEPS

1

2

3

4

5

GOAL

WHY IT'S
IMPORTANT?

DESIRED
OUTCOME

ACTION STEPS

1

2

3

4

5

GOAL

WHY IT'S
IMPORTANT?

DESIRED
OUTCOME

ACTION STEPS

1

2

3

4

5



GOAL ACTION PLAN

YEAR:

FOCUSING ON ONE GOAL AT A TIME

GOAL

YOUR WHY:

STARTED:

ACHIEVED BY:

SETTING UP FOR SUCCESS

THIS GOAL WILL
ALLOW ME TO:

SUPPORT &
ACCOUNTABILITY FROM:

I WILL CELEBRATE
ACHIEVING THIS BY:

THE ACTION PLAN

MILESTONE	STEPS	TARGET BY

NOTES & IDEAS



DATE: _____

[illegible]

SKETCH, DRAW, IDEATE

LAUNCH DATE

FINANCES	POSTAGE	SALES PRICE
	OTHER COSTS	FEE'S
	POSTAL EXPENSES	PROFIT

SKETCH, DRAW, IDEATE	
<div></div>	
LAUNCH DATE	

PRODUCT:	
DESCRIPTION	SUPPLIES

FINANCES	POSTAGE	SALES PRICE
	OTHER COSTS	FEE'S
	POSTAL EXPENSES	PROFIT



PACKAGING PLANNER

DATE:

TRACKING OUR PACKAGING INVENTORY

PRODUCT	PACKAGING SUPPLIES			
	NAME	SUPPLIER	COST	NOTES
WEIGHT				
LENGTH				
HEIGHT				
DEPTH				

PRODUCT	PACKAGING SUPPLIES			
	NAME	SUPPLIER	COST	NOTES
WEIGHT				
LENGTH				
HEIGHT				
DEPTH				

PRODUCT	PACKAGING SUPPLIES			
	NAME	SUPPLIER	COST	NOTES
WEIGHT				
LENGTH				
HEIGHT				
DEPTH				

PRODUCT	PACKAGING SUPPLIES			
	NAME	SUPPLIER	COST	NOTES
WEIGHT				
LENGTH				
HEIGHT				
DEPTH				



COMPETITOR ANALYSIS

DIFFERENTIATING OUR BUSINESS FROM THE COMPETITOR

COMPETITORS		ANALYSIS			
		STRENGTHS		WEAKNESSES	
1					
2					
3					

	MY BUSINESS	COMPETITOR 1	COMPETITOR 2	COMPETITOR 3
PRODUCTS				
PRICE				
QUALITY				



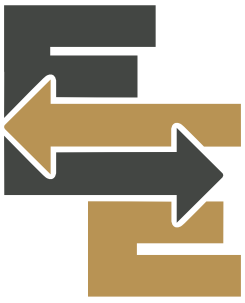
SEASONAL TRENDS

YEAR:

PLANNING FOR TRENDS IN ADVANCE

JAN	FEB	MAR
APR	MAY	JUN
JUL	AUG	SEP
OCT	NOV	DEC





ENTREENGAGE!

BUSINESS PLANNING

BUSINESS NAME:

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& RESOURCES



ANNUAL PLANNER

YEAR:

BUSINESS PLAN & GOALS THIS YEAR

JAN

FEB

MAR

APR

MAY

JUN

JUL

AUG

SEP

OCT

NOV

DEC



QUARTERLY PLANNER

AN OVERVIEW OF OUR BUSINESS GOALS

YEAR:

QUARTER ONE

QUARTER TWO

QUARTER THREE

QUARTER FOUR



MONTHLY PLANNER

YEAR:

MONTH

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

SUNDAY

TASK LIST

MONTHLY GOALS

1

2

3

NOTES



WEEKLY PLANNER

WEEK OF

PRIORITIES THIS WEEK

1
2
3

THIS WEEKS TASK LIST

THE HABIT TRACKER

NOTES

1
2
3

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

SUNDAY



DAILY PLANNER

DATE:

MY SCHEDULE

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

TODAY'S PRIORITIES

1

2

3

THIS WEEKS TASK LIST

TOMORROW

NOTES



TO DO & TASK LIST

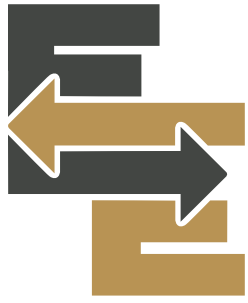
DATE:

WRITE IT DOWN & TICK IT OFF!

TOP 10 PRIORITIES

The diagram consists of a 10x10 grid of dots. The dots are arranged in a pattern that suggests a 10x10 grid, with some dots missing or faded, creating a sparse, grid-like structure. The dots are arranged in a pattern that suggests a 10x10 grid, with some dots missing or faded, creating a sparse, grid-like structure.





ENTREENGAGE!

BUSINESS TRACKERS

BUSINESS NAME:

CLICK HERE
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& RESOURCES



ORDER TRACKER

(DATE:

TRACKING OUR BUSINESS SALES

[illegible]

DATE: _____

[illegible]

ANNUAL PROFIT TRACKER

YEAR:

	TOTAL INCOME	-	PRODUCT COSTS	-	FEEs	-	SHIPPING COST	-	OTHER EXPENSE	=	PROFIT
J											
F											
M											
A											
M											
J											
J											
A											
S											
O											
N											
D											
TOTAL											



MONTHLY SALES TRACKER

MONTH:

[illegible]

SHIPPING TRACKER

DATE: _____

TRACKING ALL CUSTOMER SHIPMENTS

[illegible]

SUPPLY INVENTORY

(DATE:

ENSURING STOCK OF ALL OUR BUSINESS SUPPLIES

[illegible]

RETURNS TRACKER

(DATE:

MANAGING CUSTOMERS RETURN

[illegible]

DATE: _____

[illegible]

DATE: _____

[illegible]

DATE: _____

[illegible]

SUPPLIER LIST

DATE:

SUPPLIER NAME	
EMAIL	PRODUCT
PHONE	NOTE
ADDRESS	

SUPPLIER NAME	
EMAIL	PRODUCT
PHONE	NOTE
ADDRESS	

SUPPLIER NAME	
EMAIL	PRODUCT
PHONE	NOTE
ADDRESS	

SUPPLIER NAME	
EMAIL	PRODUCT
PHONE	NOTE
ADDRESS	

SUPPLIER NAME	
EMAIL	PRODUCT
PHONE	NOTE
ADDRESS	



CONTACT LIST

A B C D E F G H J K L M
N O P Q R S T U V W X Y Z

CONTACT NAME:

EMAIL

PHONE

NOTES:

ADDRESS

CONTACT NAME:

EMAIL

PHONE

NOTES:

ADDRESS

CONTACT NAME:

EMAIL

PHONE

NOTES:

ADDRESS

CONTACT NAME:

EMAIL

PHONE

NOTES:

ADDRESS

CONTACT NAME:

EMAIL

PHONE

NOTES:

ADDRESS

CONTACT NAME:

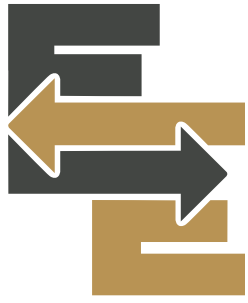
EMAIL

PHONE

NOTES:

ADDRESS





ENTREENGAGE!

SOCIAL MEDIA & MARKETING

BUSINESS NAME:

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& RESOURCES



MONTHLY SOCIAL MEDIA PLAN

MONTH:

MONTHLY SOCIAL MEDIA GOAL

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY

CONTENT IDEAS

PLATFORM	IDEA	DESCRIPTION

NOTES



SOCIAL MEDIA PLANNER

DATE:

PLANNING VIRAL CONTENT FOR MY BUSINESS

DAY	PLATFORM	POST	KEYWORDS & #	TIME
M				
T				
W				
T				
F				
S				
S				








CONTENT IDEAS			WEEKLY SUMMARY		
PLATFORM	IDEA	DESCRIPTION	TARGET	REACH	PLATFORM



WEEKLY PLANNER

DATE:

PLANNING SOCIAL MEDIA CONTENT THIS WEEK

							
MON							
TUE							
WED							
THU							
FRI							
SAT							
SUN							



SOCIAL MEDIA STATS

DATE:

TRACKING PERFORMANCE & GROWTH

JAN

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

FEB

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

MAR

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

APR

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

MAY

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

JUN

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

JUL

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

AUG

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

SEP

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

OCT

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

NOV

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	

DEC

ACCOUNT SIZE	
NEW FOLLOWERS	
NO OF POSTS	
BEST POST	
ENGAGEMENT	
REACH	
KEYWORD/#	



CAMPAIGN MANAGER

TRACKING OUR MARKETING CAMPAIGNS

DATE:

CAMPAIGN TITLE

DESCRIPTION

SUB DESCRIPTION

WHAT DO YOU WANT TO TELL THEM?:

.....
WHY SHOULD THEY CARE?:

.....
WHAT IS THE PROBLEM THIS SOLVES?:

.....
WHAT IS THE URGENCY?:

.....

CAMPAIGN RESULTS:

Successful? ☐

TARGET
.....

LAUNCH DATE

.....
☐FB ☐IG ☐TW ☐TT ☐YT ☐EM ☐PR
☐BL ☐ADS ☐RM
.....
LAUCH DATE: ____/____/____ thru ____/____/____
.....
C2A (call to action): ☐IMAGE ☐GRAPHIC
☐VIDEO ☐CAROUSEL
.....
C2A (Call to Action): Button:
Link:

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ENTREENGAGE!

GIVEAWAY TRACKER

MANAGING BUSINESS GIVEAWAYS FOR GROWTH

DATE:

GIVEAWAY NAME:

PLANNED
LAUNCHED
CLOSED

GIVEAWAY GOAL:

SUCCESSFUL?

ITEMS & PRIZES	SPONSORS

BUDGET:

LAUCH DATE:

CLOSING DATE:

ANNOUNCEMENT DATE:

PROMOTION

STRATEGY

INSTAGRAM
TIKTOK
FACEBOOK
PINTEREST
INSTAGRAM

ENTRY REQUIREMENTS & RULES

ENGAGEMENT	EVALUATE	WINNER
NO OF ENTRIES		NAME
ENGAGEMENT		CONTACT
NO OF NEW FOLLOWERS		NOTIFIED? SENT?



CONTENT IDEAS

DATE:

CAPTURING ALL OUR CONTENT INSPIRATION

TOPIC:	
IDEA & DESCRIPTION	<input type="radio"/> PLANNED?
	<input type="radio"/> CREATED?
	<input type="radio"/> EDITED?
	<input type="radio"/> POSTED?
#HASHTAGS	

TOPIC:	
IDEA & DESCRIPTION	<input type="radio"/> PLANNED?
	<input type="radio"/> CREATED?
	<input type="radio"/> EDITED?
	<input type="radio"/> POSTED?
#HASHTAGS	

TOPIC:	
IDEA & DESCRIPTION	<input type="radio"/> PLANNED?
	<input type="radio"/> CREATED?
	<input type="radio"/> EDITED?
	<input type="radio"/> POSTED?
#HASHTAGS	

TOPIC:	
IDEA & DESCRIPTION	<input type="radio"/> PLANNED?
	<input type="radio"/> CREATED?
	<input type="radio"/> EDITED?
	<input type="radio"/> POSTED?
#HASHTAGS	

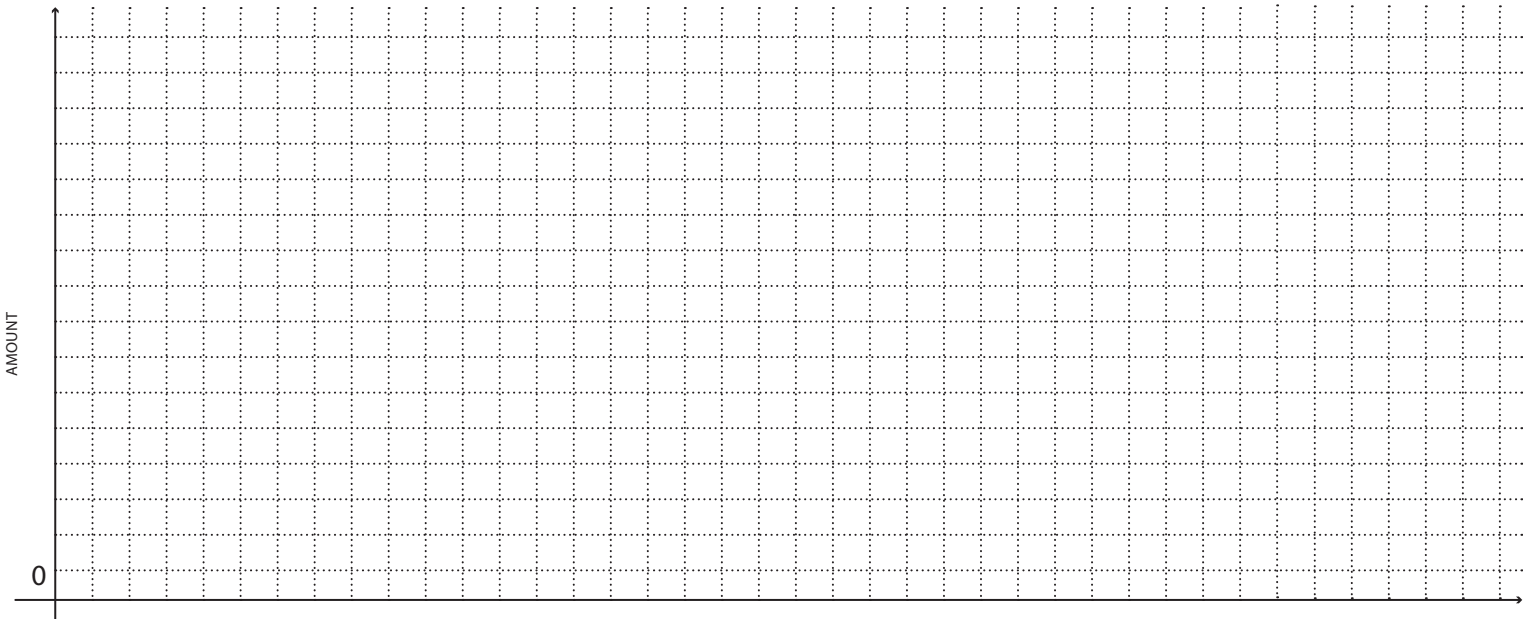


FOLLOWER GROWTH

DATE:

BUILDING A COMMUNITY FOR OUR BUSINESS

MONTH	START	END	GROWTH	TARGET	DIFFERENCE
JAN					
FEB					
MAR					
APR					
MAY					
JUN					
JUL					
AUG					
SEP					
OCT					
NOV					
DEC					



HASHTAG RESEARCH

DATE:

TRACKING OUR SOCIAL MEDIA CAMPAIGN

TOPIC	
HASHTAG	REACH

TOPIC	
HASHTAG	REACH

TOPIC	
HASHTAG	REACH

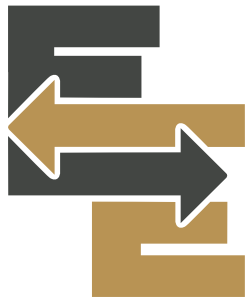
TOPIC	
HASHTAG	REACH

TOPIC	
HASHTAG	REACH

TOPIC	
HASHTAG	REACH

IDEAS & NOTES





ENTREENGAGE!

BUSINESS FINANCES

BUSINESS NAME:

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WORKSHEETS
& RESOURCES



ANNUAL FINANCES

FOR MY BUSINESS

DATE:

	FINANCIAL GOALS
1	
2	
3	
4	
5	

	ACTION STEPS
1	
2	
3	
4	
5	

JANUARY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

FEBRUARY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

MARCH		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

APRIL		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

MAY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

JUNE		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

JULY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

AUGUST		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

SEPTEMBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

OCTOBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

NOVEMBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

DECEMBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
PROFIT		

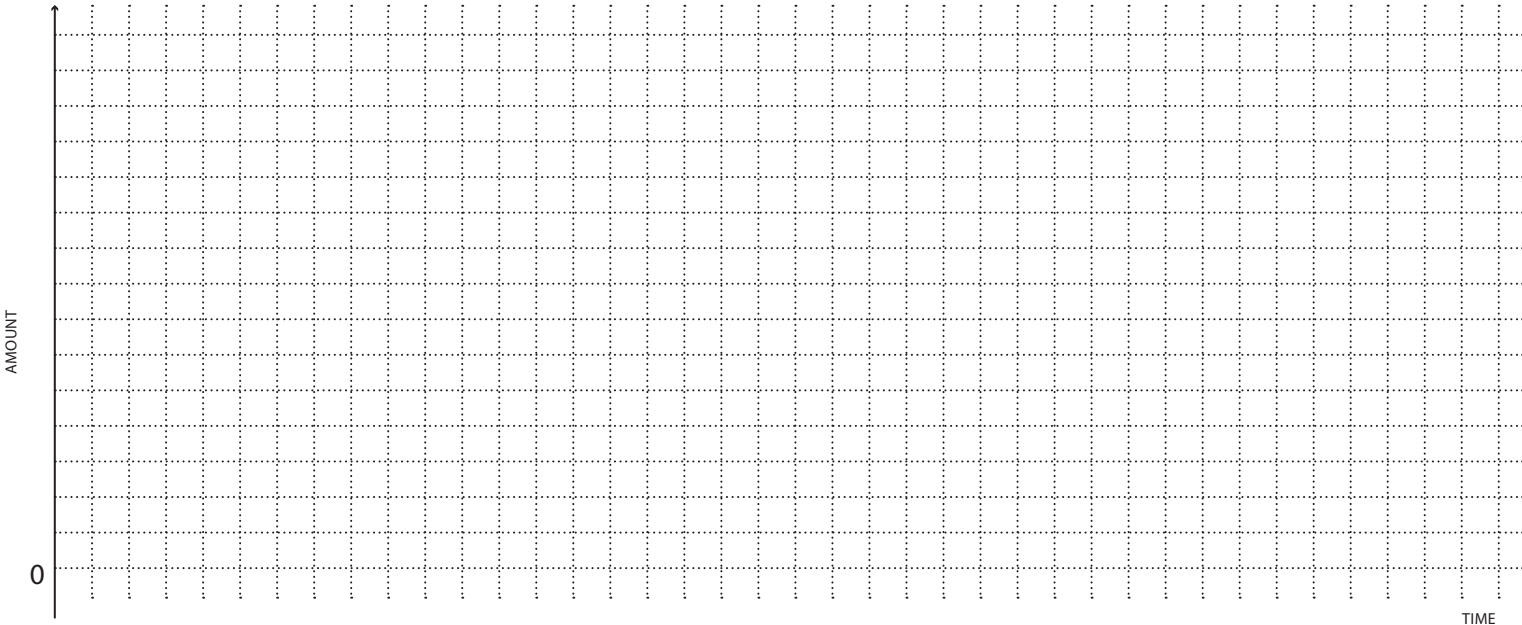
WHOLE YEAR REVIEW					
TARGET INCOME		DIFFERENCE	ACTUAL INCOME		DIFFERENCE
TARGET EXPENSES			ACTUAL EXPENSES		



ANNUAL FINANCES

FOR MY BUSINESS

DATE:



MONTH	START	END	GROWTH	TARGET	DIFFERENCE
JAN					
FEB					
MAR					
APR					
MAY					
JUN					
JUL					
AUG					
SEP					
OCT					
NOV					
DEC					



INCOME TRACKER

DATE:

MONITORING MY BUSINESS EARNINGS

[illegible]

DATE: _____

[illegible]

BILL TRACKER

DATE:

PAYING THE BUSINESS BILLS

[illegible]

TAX DEDUCTIONS

YEAR:

ANNUAL LOG

[illegible]

FOR OUR BUSINESS

[illegible]

SAVINGS	AMOUNT	BALANCE

PROFITS	PAYMENTS	BALANCE

FIXED EXPENSES	EXPECTED	ACTUAL
TOTAL:		

OTHER EXPENSES	EXPECTED	ACTUAL
TOTAL:		

MONTHLY OVERVIEW				
	INCOME	EXPENSES	SAVINGS	PROFITS
TARGET AMOUNT				
ACTUAL AMOUNT				
DIFFERENCE				

NOTES & IDEAS

DATE:

SUBJECT:

This image shows a full page of a document template. It consists of a white background with approximately 30 evenly spaced horizontal dotted lines running from left to right. There are no margins, text, or other markings on the page.

THANK YOU



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FOR MORE
WORKSHEETS
& RESOURCES

