

ENTREENGAGE!

BUSINESS WORKSHEET TEMPLATES

BUSINESS NAME:

CLICK HERE
FOR MORE
WORKSHEETS
& RESOURCES



	Name Idea & Why this Name?	URL Available?	How Memorable? (Scale of 1-5)	
01		Yes No	01	05
02		Yes No	01	05
03		Yes No	01	05
04		Yes No	01	05
05		Yes No	01	05
06		Yes No	01	05
07		Yes No	01	05
08		Yes No	01	05
09		Yes No	01	05
10		Yes No	01	05



Business name:	
What are the main products/services:	
What are the business goals?	Who is on the team? Who do you need to hire?

The Business will sell:

- Physical Product
- Physical Service
- Digital Product
- Digital Service

The Business will sell to:

- End consumer
- Another Business
- Both

The Business is located:

- Website
- Storefront
- Warehouse
- Home

What steps do you need to take to get started?

--



Why are you starting this business?	What Product or Service are you offering?

Why do Your clients need this product? What do you help them achieve?



MISSION & GOALS

<p>What is the mission of your business?</p>	<p>What is the ultimate goal? What are your financial, customer and market goals?</p>

TARGET AUDIENCE

<p>Who are your target customers? Why them?</p>	<p>What are their needs that your product or service solves?</p>	<p>Where can you reach your target customers?</p>

VALUE PROPOSITION

<p>How does your business provide more value than competition?</p>	<p>What are the key aspects that differentiate you from competition?</p>	<p>What pricing strategy are you going to use?</p>



GO-TO-MARKET

Where will you sell your product/service?	How will you market your business? What strategies will you use to get customers?

**What strategies will you use to generate awareness for your product/service?
How will you turn this awareness into actual sales?**

--	--

ORGANIZATION

What do you need to do better than your competition to provide more value to customers?	What are the skills you will need to hire or outsource?



Why will customers want to buy from you?

How is your product/service better compared to competition?

What main pain points are you solving for customers? What are you helping them achieve?



What platforms do they use? (Social Media etc.)	What other websites do they visit?
What kind of businesses do they buy from? Why?	
What kind of media do they consume? (Blog Posts, Videos, News etc.)	



What do they talk & think about?	What hobbies/interests do they have?
What are their main worries in life? How does your product/service help to solve them?	
What are their main aspirations in life? How does your product/service help to fulfill them?	

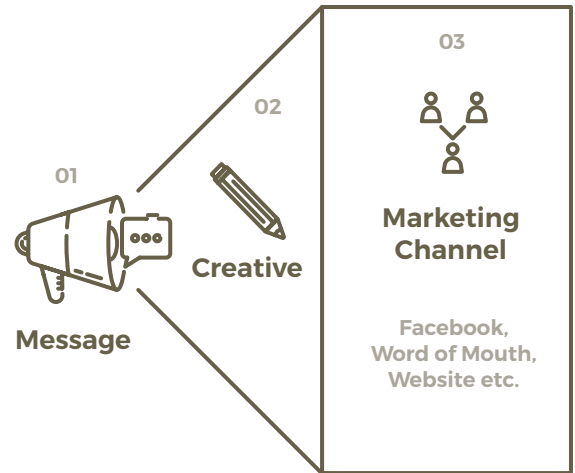


What is a marketing strategy?

Your marketing strategy consists of three main key pillars. The first one is the message you want put out to grab the attention of your target audience. The main questions to ask here is “Why should your audience care about this product/service?”, “How is it different from competition?” and “What does this product help your customers achieve - both practically and emotionally?”

The second pillar is the type of creative (content type) you use to convey the message - it can be video, article, interview etc. Getting this part right is critical to get your target audience to pay attention.

And the third main pillar is the marketing channel you use, which can be anything from word-of-mouth, social media, traditional media etc.



What is your message? How can you help your client achieve their goals?
How are you different from competition?

What kind of content (creatives) are you going to use? What will it be about?

What marketing channels will you use? Why?



MONTH	MARKETING ACTIVITY	BUDGET
JAN		
FEB		
MAR		
APR		
MAY		
JUN		
JUL		
AUG		
SEP		
OCT		
NOV		
DEC		



Product	Price	People
<p>How your product or service satisfies customer needs.</p>	<p>What does your product/service cost. How does it compare to competition?</p>	<p>Who will help you with your product/service? Who do you need to hire?</p>
Process	Promotion	Programs
<p>How do you deliver your product/service to your customers?</p>	<p>What channels will you use to market your product/service?</p>	<p>What activities will you need to do to market your product/service?</p>
Partners	Positioning	Place
<p>What other organizations will help you build or distribute your product or service?</p>	<p>Is your product/service positioned to be more premium or economical?</p>	<p>Where will you sell your product/service? Storefront, website, platform...</p>



01. Cost Based Strategy

A fixed sum or percentage of profit is added to the fixed costs to arrive at the final sale price. This method is perfect for wholesalers and businesses dealing in large quantities as the profit comes from volume.

03. Price Skimming

This involves setting high prices when a new product comes out and then lowering them gradually as new competition comes to the market. This strategy aims to get you customers at multiple price points.

05. Penetration Pricing

By selling at lower prices compared to your competition you'll be able to gain market share and make up the low sale price with higher volume. This is a good strategy for starting businesses with low fixed costs.

02. Value Based Strategy

A final price is based on the perceived value for the customer - ex. cost of logo will be higher for a large company compared to a small mom & pop's.

04. Bundle Pricing

By bundling your products together into larger packages you provide higher perceived value for your customers - which increases conversion rate and sales numbers. Perfect for digital products

06. Premium Pricing

The holy grail of pricing. By asking higher prices than your competitors you are asserting your company/brand as higher quality. Perfect for niche products.

What pricing strategy works best for your business? Why?



What's a sales funnel anyway?

The easiest way to think of a sales funnel is thinking of it as a process by which you educate the target audience about a certain problem they have. You do this by answering the most burning questions they would google or ask a friend (How to build a website? Do I need a Website for my business? etc).

By creating various types of content (see funnel model below) you guide the prospect through a process where they get more and more aware of the problem they have and potential solutions - and if you've built the funnel right, they will see at the end of the funnel, once they're ready to make a purchase, that your solution is the best option for them (well differentiated from the competition)!

The sales funnel is a create opportunity to establish yourself as a thought leader and a professional so make sure you provide high quality content along the whole funnel - something that people actually want to see/download/read!



TOFU - Top Of the Funnel

The purpose of this type of content is to create awareness of your business. This may include educational and helpful blog posts answering the most frequent questions of your audience, tutorials, entertaining videos, useful social media posts etc. This type of content answers the question "What do I need to do to solve my problem?"

MOFU - Middle Of the Funnel

Provide insights using case studies and lead magnets (downloadable PDF for example) so the prospect is willing to trade his/her email or contact information in order to access the content. This type of content answer the question "Why do I need this product/service from you?"

BOFU - Bottom of the Funnel

Use showcases, free assessments, demos and customer testimonials to convince the prospective client of the value your business provides. Show how other people who have purchased from you have succeeded. If you don't have testimonials or showcases, consider doing a free engagement for a high profile client in exchange for a testimonial. This type of content answer the question "Why do I need this product/service now?"

See the Next Page to Fill out Your Sales Strategy >



**What is your TOFU strategy to generate awareness?
What specific pieces of content you'll need? Who is going to create it? Where to distribute?**

**What is your MOFU strategy to generate awareness?
What specific pieces of content you'll need? Who is going to create it? Where to distribute?**

**What is your BOFU strategy to generate awareness?
What specific pieces of content you'll need? Who is going to create it? Where to distribute?**



Use this worksheet to consider your selling options. Mark down the channel/platform where you're going to sell your product or service and then analyze the pros and cons of each one. This will help you get clarity on what channels are the best suited for your business.

Selling Channel	Pros	Cons	Competitors



Awareness

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

Interest

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

Desire

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

Action

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



Product Comparison

Product or Service:		
What customer needs does this product/service solve:	How does your product/service solve them better than competitors:	

	Your Product:	Competitor 01:	Competitor 02:
Key Feature:			
Impact			
Price			
Speed of Delivery			
Convenience			
Professionalism			
Aesthetics			



Product or Service:

Why are customers buying this product or service?

What are most important features for your clients? (price, professionalism, ease of use, etc?)

What features are your competitors offering?

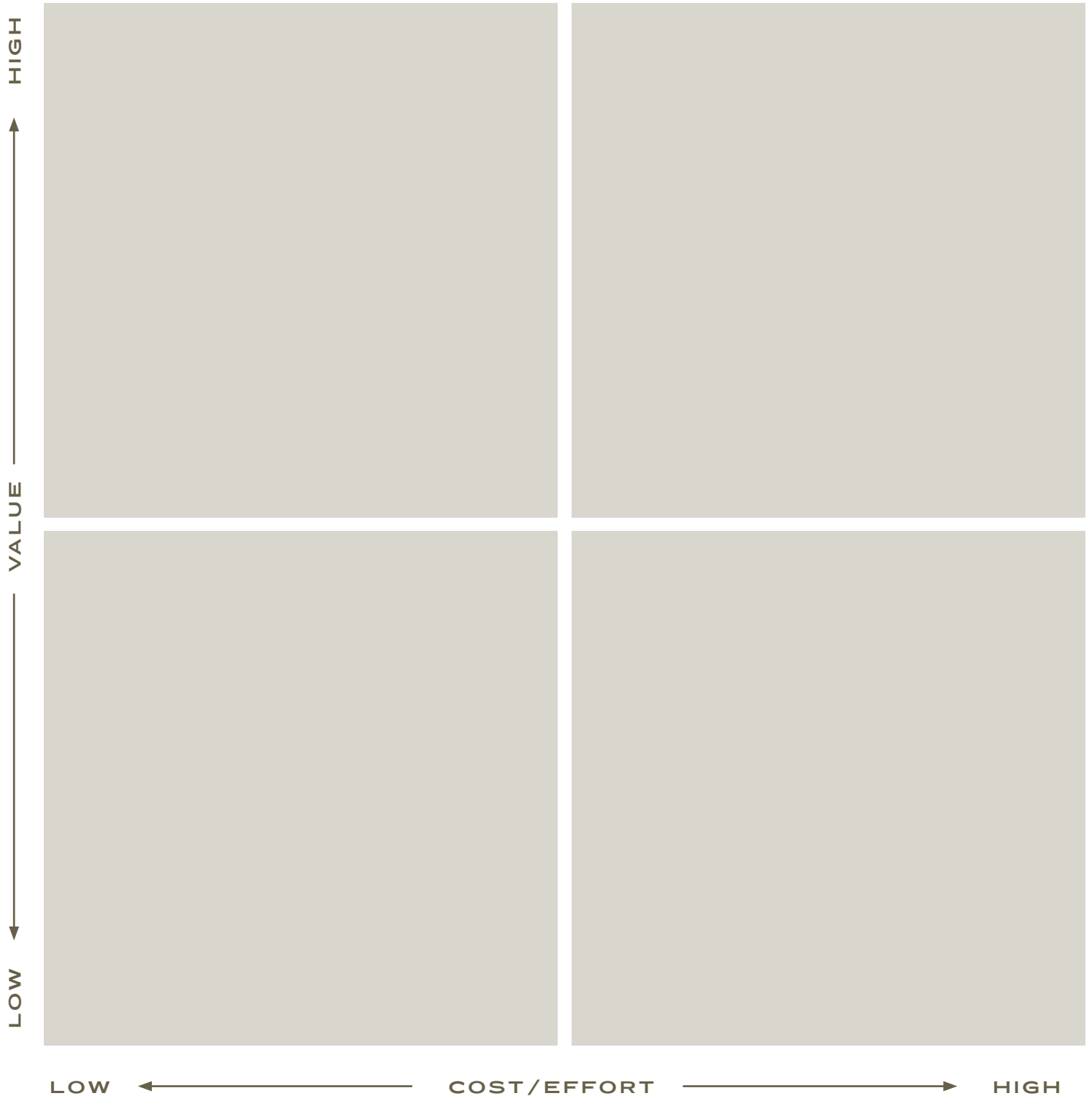
What features are they lacking?

What features could you offer to add more value compared to your competition?

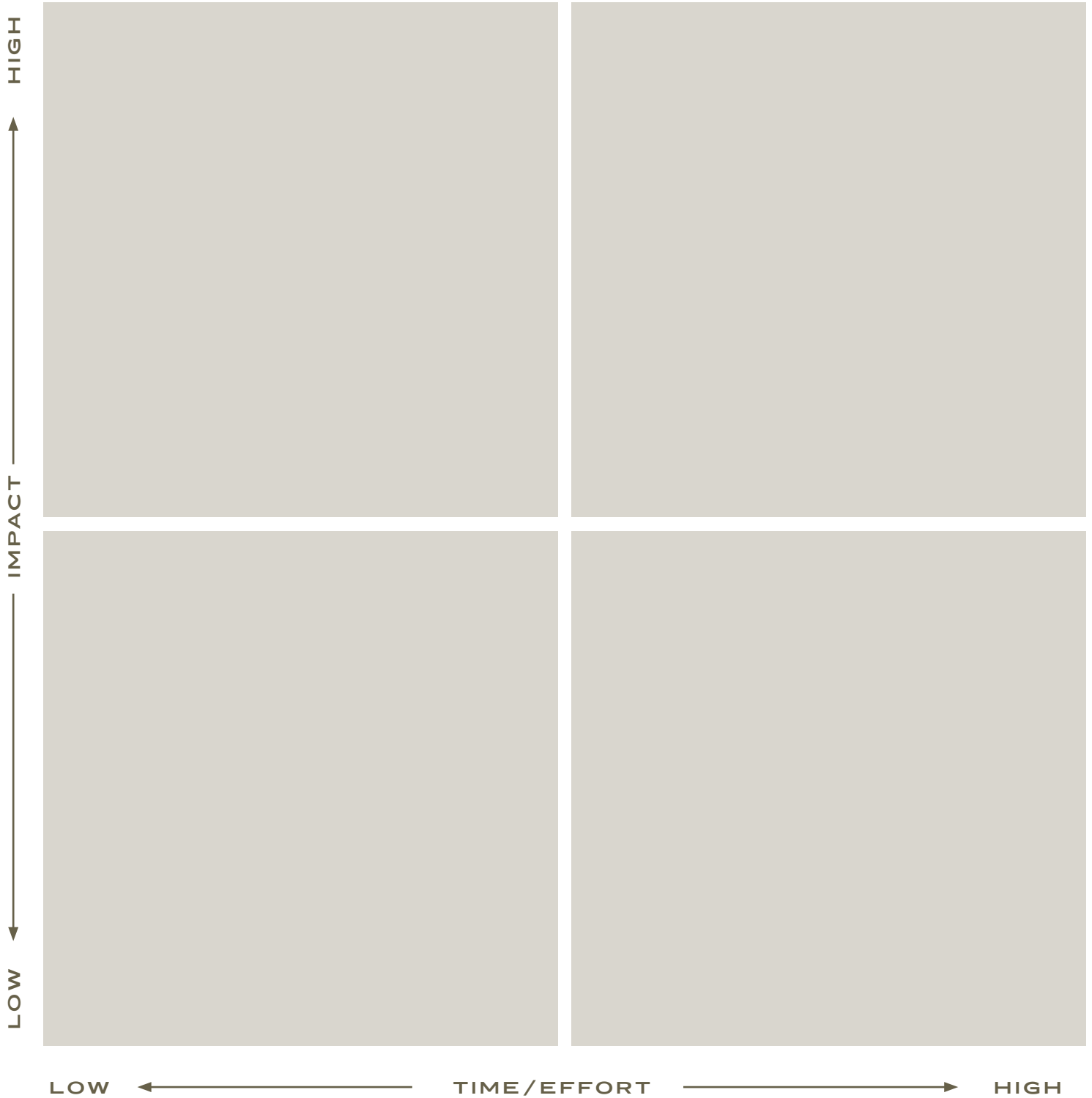


Feature Priority Matrix

Use this worksheet to determine the features that your clients need the most and how costly and difficult they are to implement. This will give you clarity about which features you should be prioritizing in your product or service.



Use this general purpose priority matrix to define the processes and activities you must do to start and grow your business and determine which ones you should focus on the most!



Who are your main competitors?	What client problems are they solving?
What are they doing well?	What can you do even better?
How are they reaching their customers?	
How are they pricing their products?	



Customer Problem	
Your Solution	Key Activities
Unique Value Proposition	Your Competitive Advantage
Selling/Marketing Channels	Target Markets
Pricing Strategy	Key Costs



Use this exercise to define various aspects of your business in order to get more clarity and to know what to prioritize.

01 What are we selling?	02 Who are we selling to?
03 Where do we reach clients?	04 Why do clients need this?
05 How do we distribute?	06 When should we launch?



Use this SWOT Analysis worksheet to determine your strengths, weaknesses, opportunities and threats. This will help you get more clarity about what you should focus on and what pitfalls you should try to avoid.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS



Product/Service:	Offered Features:	Pricing:

Product/Service:	Offered Features	Pricing:

Product/Service:	Offered Features	Pricing:

Product/Service:	Offered Features	Pricing:

Product/Service:	Offered Features	Pricing:



Where to sell online?

Etsy Store

Print on Demand

Amazon Marketplace

Facebook Marketplace

Ebay Auctions

Own Website

Where to sell physically?

Retail Store

Kiosk

Sell from Home

Pop-up Store

Partner with a Store

Physical Market

Fairs & Conventions

Selling methods

Direct to Consumer

Use an Affiliate Program

Use a Distributor

Dropshipping

Partner with a Store

Whitelabel

Notes:



Item Name	Required?	Notes
	Yes	
	No	
	Yes	
	No	
	Yes	
	No	
	Yes	
	No	
	Yes	
	No	
	Yes	
	No	



Startup Costs

Item Name	Cost
Total Cost:	



PROJECT DESCRIPTION

--	--

KEY ACTIVITIES

KEY RESOURCES

--	--

--

PROJECT MILESTONES

--



My Vision or Goal:	
Steps to Take	Financial Cost
Actions to Take to Achieve This	
Potential Problems (& How to Fix Them)	Current Progress



Expense/Income Tracker

ITEM	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Monthly Total												
	Yearly Total											



A large grid of dots for taking notes, consisting of 13 columns and 20 rows of small black dots.



