

Business Overview

Business Name: _____

Business Type: _____

Owner: _____

Contact Info: _____

Mission

Vision

Primary Markets

Core Values

Primary Markets

Annual Business Goals

Vision for This Year

One sentence describing what success looks like this year.

Top 3 Business Goals

Goal 1

Goal:

Why is this important?

Target Date:

Goal 2

Goal:

Why is this important?

Target Date:

Goal 3

Goal:

Why is this important?

Target Date:

Success Metrics

One sentence describing what success looks like this year.

Revenue Goal:

Customers Goal:

Orders Goal:

Other KPI:

Goal Action Plan

Key Milestones

Milestone	Date	Done

Potential Challenges

What obstacles could slow your progress?

Solutions

How will you overcome these challenges?

Next Action Steps

Start with the most important tasks.

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Product Planner

Product Name: _____

Product Category: _____

Product Description (Briefly describe your product or service):

Target Customer (Who is this product for?):

Selling Price: _____

Estimated Cost: _____

Expected Profit: _____

Launch Date: _____

Sales Channels

Where will you sell this product?

☐ Etsy

☐ Shopify

☐ Amazon

☐ Website

☐ Social Media

☐ Retail

☐ Other: _____

Product Status

☐ Idea

☐ In Development

☐ Ready to Launch

☐ Active

☐ Discontinued

Marketing Ideas: _____

Supplies List

Category: _____

Check Frequency: _____

[✓]	ITEM DESCRIPTION	MIN	NOW	BUY	DONE
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Restock ASAP

In Transit

Order Form / Work Order

Order #: _____

Date: _____

Name / Co: _____

Phone / Email: _____

Shipping Address: _____

[✓]	ITEM / SERVICE	QTY	PRICE	TOTAL
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Due Date / Ship Date: _____

Subtotal: \$ _____

Tracking #: _____

Discount: \$ _____

Shipping / Tax: \$ _____

Grand Total: \$ _____

Payment Method: ☐ Cash ☐ Card ☐ Invoice ☐ Online

Payment Status: ☐ Unpaid ☐ Deposit ☐ Paid in Full

Order Type: ☐ Shipping ☐ Pickup ☐ Service

Order Tracker

Period / Month: _____

[illegible]

Total Orders:

Total Revenue: \$

Pending:

Weekly Planner

Week of: _____

Top Priorities

1

2

3

Weekly Sales / Revenue Target: \$ _____

Monday

Date: _____

☐ Fulfillment ☐ Social Post ☐ Finances

Tuesday

Date: _____

☐ Fulfillment ☐ Social Post ☐ Finances

Wednesday

Date: _____

☐ Fulfillment ☐ Social Post ☐ Finances

Thursday

Date: _____

☐ Fulfillment ☐ Social Post ☐ Finances

Friday

Date: _____

☐ Fulfillment ☐ Social Post ☐ Finances

Saturday

Date: _____

☐ Fulfillment ☐ Social Post ☐ Finances

Sunday

Date: _____

☐ Fulfillment ☐ Social Post ☐ Finances

Actual Revenue: \$ _____

Notes for Next Week: _____

Monthly Planner

Month: _____ | Year: 20____

Main Goal Of The Month:

MON	TUE	WED	THU	FRI	SAT	SUN

Financial Targets

Revenue Goal: \$ _____

Profit Goal: \$ _____

Actual Revenue: \$ _____

Actual Profit: \$ _____

Important Dates / Events

Top Priorities / Projects

- ☐ 1. _____
- ☐ 2. _____
- ☐ 3. _____

☐ Monthly Promotion Done ☐ Inventory Checked ☐ Expenses Reviewed

Income Tracker

Month/Period: _____

Total Income: \$ _____

Goal: \$ _____

Pending / Unpaid: \$ _____

DATE	SOURCE	PRODUCT / SERVICE	PAY VIA	PAID?	AMT (\$)
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Total Revenue For The Period: \$ _____

☐ Reconciled with Bank

☐ Invoices Issued

Expense Tracker

Month/Period: _____

Total Expenses: \$ _____

Budget: \$ _____

Net Income: \$ _____

DATE	VENDOR / PAYEE	CATEGORY	PAY VIA	RCPT?	AMT (\$)
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Total Expenses For The Period: \$ _____

- ☐ Receipts Saved
- ☐ Tax Deductibles Checked

Password Tracker

Category: _____

Tip: Use password hints instead of full passwords for security!

WEBSITE / APP	USERNAME / EMAIL	PASSWORD / HINT	PIN / 2FA	UPDATED

Password Best Practices

Complexity Standard: \$12+\$ Chars • Uppercase (A-Z) • Lowercase (a-z) • Numbers (0-9) • Symbols (!@#\$\$%^&*)

Security Rules: Always enable 2FA/OTP • Use Unique Passwords • Store Hints Only (no raw passwords)

Monday

Date: ____ / ____ / ____

Top Priority / Main Focus

#1 _____

#2 _____

#3 _____

Schedule / Appointments

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To-Do List

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Orders & Fulfillment

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Quick Notes

☐ Fulfillment Done ☐ Social Post ☐ Finances Tracked

Tuesday

Date: ____ / ____ / ____

Top Priority / Main Focus

#1

#2

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Schedule / Appointments

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To-Do List

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Orders & Fulfillment

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Quick Notes

☐ Fulfillment Done

☐ Social Post

☐ Finances Tracked

Wednesday

Date: ____ / ____ / ____

Top Priority / Main Focus

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#3 _____

Schedule / Appointments

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To-Do List

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Orders & Fulfillment

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Quick Notes

☐ Fulfillment Done ☐ Social Post ☐ Finances Tracked

Thursday

Date: ____ / ____ / ____

Top Priority / Main Focus

#1

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Schedule / Appointments

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To-Do List

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Orders & Fulfillment

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Quick Notes

☐ Fulfillment Done

☐ Social Post

☐ Finances Tracked

Friday

Date: ____ / ____ / ____

Top Priority / Main Focus

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#3 _____

Schedule / Appointments

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To-Do List

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Orders & Fulfillment

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Quick Notes

☐ Fulfillment Done ☐ Social Post ☐ Finances Tracked

Saturday

Date: ____ / ____ / ____

Top Priority / Main Focus

#1 _____

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#3 _____

Schedule / Appointments

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To-Do List

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Orders & Fulfillment

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Quick Notes

☐ Fulfillment Done ☐ Social Post ☐ Finances Tracked

Sunday

Date: ____ / ____ / ____

Top Priority / Main Focus

#1 _____

#2 _____

#3 _____

Schedule / Appointments

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To-Do List

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Orders & Fulfillment

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Quick Notes

☐ Fulfillment Done ☐ Social Post ☐ Finances Tracked