

FREE

1 HOUR BUSINESS PLAN WORKSHEET



MARKETING BOSS



A MESSAGE TO ENTREPRENEURS

I WANT TO MAKE IT EASY FOR YOU

Being an entrepreneur can be difficult, but it doesn't always have to be. I created this resource to make it easier for entrepreneurs to grow companies with proven sales and marketing tactics. It is the byproduct of the insights I have accumulated throughout my career and was inspired by my desire to simplify things for business owners like us.

As an entrepreneur myself, I know what it's like to feel overwhelmed by all of the hats business owners have to wear. I have multiple businesses and am also a mother of 5 boys who appreciates efficiency. I identified the essentials every business owner needs to master in marketing and sales and used my insights to create resources like this for myself and other entrepreneurs.

In addition to owning multiple businesses, I have helped many other business owners grow companies. I have been a marketer for over 23 years. I have spent the latter part of my career working with entrepreneurs looking to grow their companies through strategic marketing consulting and implementation.

I combined my marketing background with my business expertise to design tools to help business owners think through some of the most critical elements of a business; the way a marketer approaches them.

I hope that you will leverage what I created to make your business more profitable in less time.

Margarita Eberline

Margarita Eberline
Marketing Boss Founder



BUSINESS SET-UP

FORECASTING

INSTRUCTIONS: Think about your business and what you are selling. Then think about additional things you can sell. For example, if you are selling tangible products, what sort of intangible services can you sell? If you are selling both tangible and intangible, how can you make passive income with your business? After you jot down your ideas, set a goal for each sales type.

TANGIBLE

GOAL

\$ _____

INTANGIBLE

GOAL

\$ _____

PASSIVE

GOAL

\$ _____



BUDGETING

INVEST TO GROW

INSTRUCTIONS: Plan to manage your business revenue in a way that is conducive to growth. You will need to decide how much of your revenue you want to invest back into your business and how. The following are areas that every business should factor in. Describe the way you anticipate tackling these expenses and set an estimated budget for each type of expense.

PROFESSIONAL SERVICES (LAWYERS, ACCOUNTANTS ETC)

BUDGET

\$ _____

MARKETING & ADVERTISING (WEBSITE, DESIGN, ADS ETC)

BUDGET

\$ _____

OPERATIONS (INVENTORY, OVERHEAD, ETC)

BUDGET

\$ _____



PROFITABILITY

FORECAST FOR GROWTH

INSTRUCTIONS: It's important to understand how much sales volume you need to be profitable and/or to identify if your business is even viable enough to be profitable in the marketplace based on how you are structured. It is completely normal to have months where your profits are up or down. It would be best to track your progress regularly to make sure you are always headed in the right direction. You can use the following calculations each month to track your progress. Doing this will get you into the habit of finding ways to reduce your expenses to maximize your profits and/or setting more aggressive sales goals to offset major expenses you want to make in your business, such as advertising to expand or buying inventory. Sometimes increasing expenses by investing strategically can set you up for more profits later, so it's important to look for patterns when analyzing your data.

EXAMPLE

TOTAL SALES	-	TOTAL EXPENSES	=	PROFITS
<u>\$500</u>		<u>\$100</u>		<u>\$400</u>

CALCULATION

	TOTAL SALES	-	TOTAL EXPENSES	=	PROFITS
MONTH 1	<u>\$</u>		<u>\$</u>		<u>\$</u>

	TOTAL SALES	-	TOTAL EXPENSES	=	PROFITS
MONTH 2	<u>\$</u>		<u>\$</u>		<u>\$</u>

	TOTAL SALES	-	TOTAL EXPENSES	=	PROFITS
MONTH 3	<u>\$</u>		<u>\$</u>		<u>\$</u>



MARKETING

ESSENTIALS

INSTRUCTIONS: Think about your target customer and how you will reach them, sell to them and stay in touch with them after; for future sales and referrals.

DESCRIBE YOUR IDEAL CUSTOMER.

WHAT MEDIA DO THEY USE AND HOW?

WHAT SORT OF MESSAGES AND OFFERS MIGHT INTEREST THEM?

HOW WILL THEY BUY FROM YOU?

HOW WILL YOU GET POSTIVE REVIEWS AND REFERRALS FROM THEM?



STRATEGIC GOALS

FOCUS ON PERFORMANCE

INSTRUCTIONS: Now that you have outlined what you are selling, whom you are selling it to, and how you are marketing for sales, you can set clear objectives for each effort you plan to make. Use the table below to make a list of everything you plan to do and set some sales goals for each effort. Calculate the revenue you can expect from each customer over time, not just in the first sale. In the example below, I anticipate that each customer will either buy twice or refer a friend, estimating a lifetime value of \$5,000 per new customer.

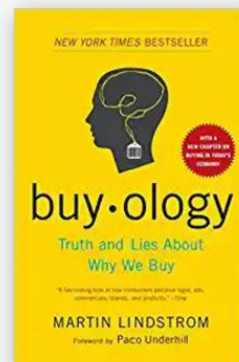
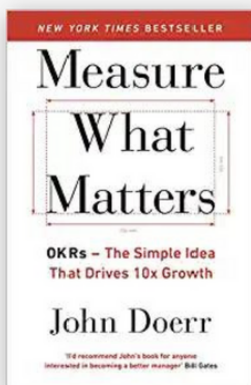
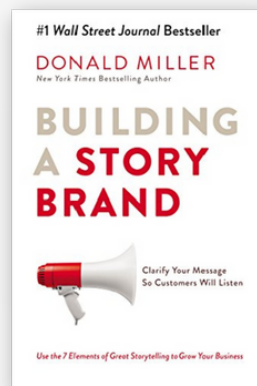
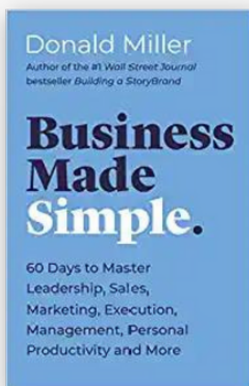
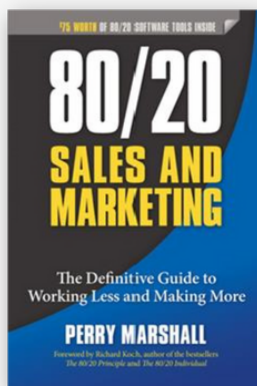
INVESTMENT	ESTIMATED LEADS	ESTIMATED CUSTOMERS	COST PER CUSTOMER	LIFETIME VALUE
ABC TV \$5000	10	2	\$2,500	\$10,000

EXAMPLE



RECOMMENDED READING

TO LEARN MORE ABOUT THE TACTICS RECOMMENDED IN THIS WORKSHEET, YOU CAN PICK UP THESE RECOMMENDED TITLES FROM MY WEBSITE.





THANK YOU

LET'S HAVE COFFEE!

I hope you found this resource helpful and simple to use. I invite you to stay in touch with me to take advantage of more resources like this. I will be sending you emails from time to time with news and tips that I think you may find interesting based on what you have shared with me about your business and your goals. I also post to my social media accounts regularly and would love to connect with you there as well.

If you would like some assistance with this worksheet or your business in general, I offer free consultations, so don't be shy. You can book a virtual coffee with me any time.

“You deserve to grow your business and feel good about the way you are doing it.”

-MARGARITA EBERLINE

