

Excerpted from <u>Six-Week Start-Up</u>

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Use the space below to begin developing your corporate identity. You may want to draw pictures, as well as use words and



## CREATING MY IDENTITY

| phrases, to develop the look, feel, and message you want to convey. You will continue this process in Week Six. |
|---|
| Business name   |
|   |
|   |
|   |
| Tagline and keywords for marketing material   |
|   |
|   |
|   |
| Logo  |
|   |
|   |
| Colors  |
|   |
|   |
|   |
| Distinct product design   |
|   |
|   |
|   |
| Distinct packaging  |
|   |
|   |
|   |
| Decor, employee clothing, or other unique identifying features  |
|   |
|   |
|   |



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## WHO ARE MY CUSTOMERS

Describe whom your customers are in each of the following categories. You'll find that the number of customers in each category grows the closer you get to the "end user."

| End Users / Consumers                                 |
|---|
|   |
|   |
|   |
| Purchasers / Decision Maker (if different from above) |
|   |
|   |
|   |
| Retail Sales Personnel                                |
| Retall Sales Personnel                                |
|   |
|   |
|   |
| Retailer Decision Maker(s)                            |
|   |
|   |
|   |
| Wholesale / Distributor Sales Personnel               |
|   |
|   |
|   |
| Wholesale / Distributor                               |
| Decision Maker(s)                                     |
|   |
|   |
|   |
| Others:   |
|   |
|   |
|   |
|   |
|   |
|   |
| $\vee$  |



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## VITAL STATISTICS

Use this worksheet to keep track of important dates, numbers and information about the legal status of your business or yourself. You may be asked to refer to these often.

| Date of incorporation:   |  |
|--|--|
| Corporation number:  |  |
| Formal company name:   |  |
| "DBA"/in what county filed/date/number:                            |  |
| Federal Employer Identification Number ("EIN"):                    |  |
| State Employer Identification Number:                              |  |
| Federal business license or permit number:                         |  |
| State business license or permit number:                           |  |
| City business license or permit number:                            |  |
| Better Business Bureau number:                                     |  |
| Unemployment insurance provider/date of instatement, renewal date: |  |
| Cther:   |  |
|  |  |



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## DESIGNING MY PRODUCTION PROCESS

As you outline the steps involved in your production process—whether you produce a product or a service consider the following items, how long the steps take, and who is responsible.

| What supplies do I need?                                  |  |
|---|--|
|   |  |
|   |  |
| When do I need them?                                      |  |
|   |  |
|   |  |
|   |  |
| How much labor is required?                               |  |
|   |  |
|   |  |
|   |  |
| How will I set standards?                                 |  |
|   |  |
|   |  |
|   |  |
| How will I ensure those standards are met consistently?   |  |
|   |  |
|   |  |
| How will I reduce inefficiencies in the process?          |  |
|   |  |
|   |  |
|   |  |
| How will I ensure safety?                                 |  |
|   |  |
|   |  |
|   |  |
| How will I ensure adequate access to necessary utilities? |  |
|   |  |
|   |  |
| How can I reduce waste and conserve energy and water?     |  |
| - now can reduce waste and conserve energy and water:     |  |
|   |  |
|   |  |
| How will I dispose of waste?                              |  |
|   |  |
|   |  |
|   |  |



**BUY IT!** 

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## TAKING STOCK: WHAT ARE MY EXISTING ASSETS?

|                                     | <b>Specifics</b><br>(amount, type, etc.) | How Readily<br>Available |
|-------------------------------------|--|--------------------------|
| Financial Assets:                   |  |                          |
| Savings                             |  |                          |
| Income from other sources           |  |                          |
| Spouse's income                     |  |                          |
| Credit lines/Credit cards           |  |                          |
| Stocks & other liquid assets        |  |                          |
| Home equity                         |  |                          |
| Retirement funds                    |  |                          |
| Tangible Assets:                    |  |                          |
| Equipment                           |  |                          |
| Furniture                           |  |                          |
| Space/Location                      |  |                          |
| Business/Professional Assets:       |  |                          |
| Marketable skills                   |  |                          |
| Specialized knowledge               |  |                          |
| Business experience                 |  |                          |
| Certifications/Credentials          |  |                          |
| Licenses, Memberships               |  |                          |
| Ability to make sales               |  |                          |
| Good customers/client relationships |  |                          |
| Personal Assets:                    |  |                          |
| Education/Training                  |  |                          |
| Intelligence                        |  |                          |
| Excellent communication skills      |  |                          |
| Outstanding work habits             |  |                          |
| Business or financial connections   |  |                          |
| Rich relatives or friends           |  |                          |
| Supportive family or friends        |  |                          |
| Ambition & passion                  |  |                          |
| Other:                              |  |                          |
| Other:                              |  |                          |



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## MARKETING VEHICLES COMPARISON CHART

| QUESTIONS  | DIRECT MAIL<br>brochures,<br>fliers,<br>coupons | SIGNAGE<br>vehicles,<br>building,<br>billboards | PRINT MEDIA<br>newspapers,<br>magazines<br>phonebook | BROADCAST<br>MEDIA<br>television,<br>radio |
|--|---|---|--|--|
| What market do they reach?   |   |   |  |  |
| How big is their reach?  |   |   |  |  |
| What percentage of their market is my target market?               |   |   |  |  |
| What is the Cost per<br>Thousand (CPM)<br>reached?                 |   |   |  |  |
| What frequency<br>will I need to be<br>effective?                  |   |   |  |  |
| What is the reason-<br>able immediate<br>response I can<br>expect? |   |   |  |  |
| How expensive is the ad to prepare?                                |   |   |  |  |
| What are this vehi-<br>cle's advantages?                           |   |   |  |  |
| What are this vehi-<br>cle's disadvantages?                        |   |   |  |  |
| Other:   |   |   |  |  |



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| ONLINE<br>website, SEO,<br>SEM, ads, email<br>newsletters , daily<br>deals, mobile<br>marketing | TRADE SHOWS,<br>NETWORKING | PUBLIC<br>RELATIONS,<br>PUBLICITY | SOCIAL<br>NETWORKING<br>blogs, Facebook,<br>Twitter, YouTube,<br>LinkedIn,<br>Pinterest, etc. | OTHER<br>In-store<br>marketing,<br>sampling |
|---|----------------------------|-----------------------------------|---|---|
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |
|   |                            |                                   |   |   |