

BUSINESS PLANNER

**A Better Way To Organize
Your Business And Life!**

Section 1: Your Business

Section 2: Your Tribe

Bonus: Online Tools & Resources

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Welcome!

Thank you for downloading this business planner PDF. It was made for small businesses and entrepreneurs who need greater clarity in their business. It represents over a six years of teaching business to clients and university students. Every worksheet was designed to be as simple as possible and to be able stand on its own. But here's the most important note:

Each worksheet could benefit from a 1-10 page explanation, but that is omitted on purpose.

This planner was created for those with a familiarity of basic business terms. It's also for those wanting something they can apply right now. I trust if further information about each concept is needed, the plethora of resources online are at your disposal. I also teach courses off and online that do unpack each concept and worksheet. Lastly, you can contact me at ArliePeyton.com for any questions.

Good luck!

Peyton

Remember:

Knowledge and resources are useless
without application.

To get superior results, you must

APPLY

what you've learned to your business.

Experiment, test, repeat.

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SECTION 1

Your Business



GET FOCUSED

Managing Your Energy

Instructions: Often in our lives what gets in our way is not only time obstacles, but energy obstacles too. We try to get things done and certain people or things seem to sap our energy. Other times when we work on tasks there is something that invigorates and boosts our energy. To be clear about what influences our energy level, fill out the lists below and begin to unpack what's going on.

WHAT GIVES YOU ENERGY?

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WHAT TAKES YOUR ENERGY?

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-

PATTERNS & INSIGHTS

1-PAGE BUSINESS MODEL

The Only Business Model You Need

Instructions: Every successful business has 12 essential business components. Fulfillment of all of these components gives you greater clarity and certainty about your business or business idea. No complex formulas or questionnaires.

The Business Model Worksheet (BMW) is the only one-page worksheet/canvas that addresses the top reasons why businesses fail and why they succeed. This works for any business and at any stage. Click the link below for a larger, printable PDF worksheet and instructions:

Get your free worksheet and 25-page guide at <https://arliepeyton.com/bmw>

BUSINESS MODEL WORKSHEET
created by www.ArliePeyton.com

Date _____
Worksheet # _____
☆☆☆☆

Company _____ Industry _____

Instructions: This is a fillable form; just click in each box or line and start typing. Or, you can print this form and hand-write your answers. Answer all the questions.

1. Segment [Target Market] What profitable and underserved market segments will you be serving? Can you niche down deeper so it's not too broad?	2. Sizable Problem [Size of Market] What is the main problem your segment has? Approximately how many people in your niche have the problem you're trying to solve? What is your Total Addressable Market (TAM) worth in dollars?	3. Solution [Pain Reliever] What are the top 3 pains of your ideal customer and top 3 solutions you provide? What is the #1 feature and benefit?
4. Unique Selling Point [Value] Why would a customer choose your solution over others?	5. Unfair Advantage [Secret Sauce] What vital resources do you bring to the table that makes this business hard to replicate? Why are you the perfect person/team to do the job?	6. Unending Lead Generation [Traffic] What does your high-volume, high-quality customer lead generation system look like? How do you market to your ideal customers?
7. Minimum Viable Product [The One Thing] What is the one thing your product or service must do right and do very well? Does your MVP solve the major problem of the customer?	8. Metrics [Progress] What are the top 5 things you should be doing that will generate the greatest targeted results? What level must you maintain with each?	9. Mantra [Focus] What is one word or phrase that completely captures the spirit and essence of this company?
10. Cost Structure [Expenses] What are the basic itemized costs for your business? What expenses should you keep a close watch on? What does one unit cost?	11. Revenue Streams [Earnings] Where does the bulk of your revenue come from? Are other streams of revenue feasible at this time?	12. Story [Connector] What story do you tell customers to connect with them? What's your best customer story? What is the story of this company so far? What's your brand story?

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STRATEGY MAP

Plan For Success

Instructions: Strategy Maps are used by businesses and the military to complete projects with great efficiency and effectiveness. The diagram below is one of many tools used to brainstorm your business projects.

Project Title

Resources

List all relevant tangible and intangible resources.

Tasks

List all the tasks needed to get the outcome. Reverse engineer this list to create the sequence.

Core Values

Outcomes

Succinctly state the desired outcomes. Be specific and use numbers and dates if possible.

CALENDAR & PLANNER

Yearly and Monthly Goals

Instructions: Add in the biggest goals for each month.

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JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

CALENDAR & PLANNER

Yearly and Monthly Goals

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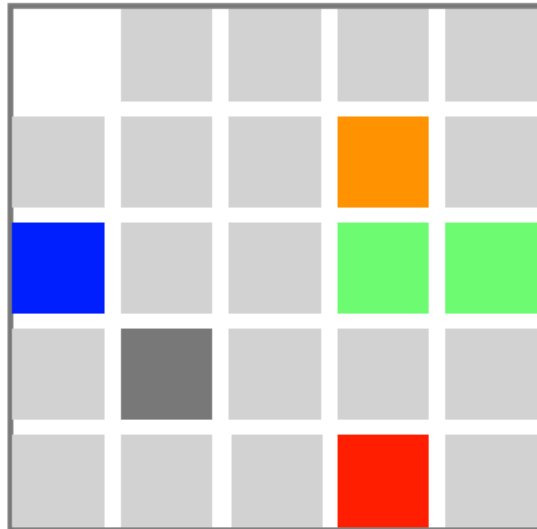
Instructions: Add in the biggest goals for each month.

JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

TIME MANAGEMENT GUIDE

Sprint Instead Of Multi-task

Instructions: Below is a simple concept many business owners have adopted when learning how to focus their time: [Sprints](#).

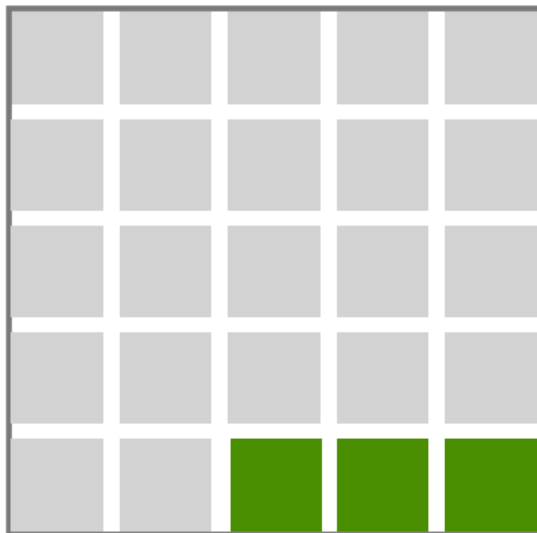


Mixed-Priority Units

The Problem With Task-Switching

Unfocused work takes 2-3 times longer to complete. Often projects lack a system, intelligent strategy, and unity. Sometimes priorities are blurred and deadlines are missed.

Outcome



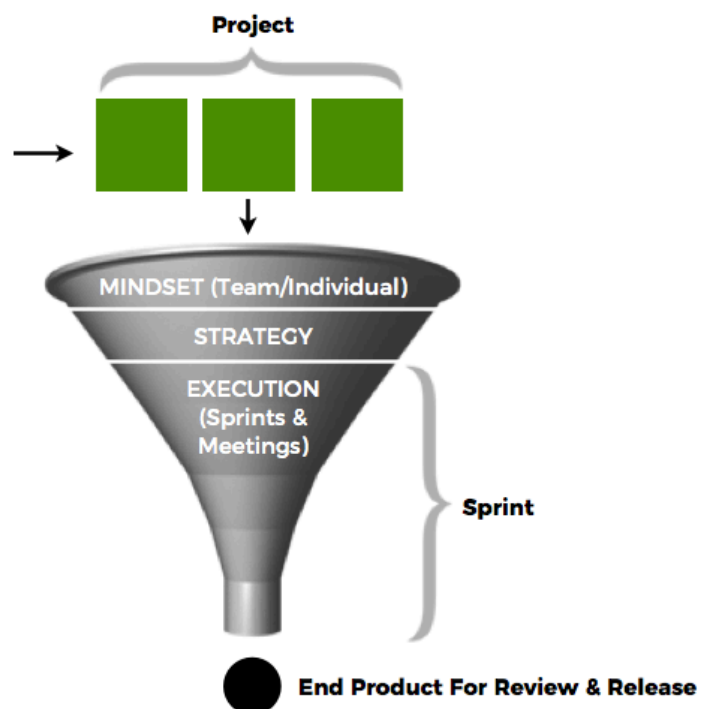
High-Priority Units
(Single Task)

Time and Energy Management Using Sprints For Explosive Productivity

[Sprints](#) are 2-4 week focus cycles used for high-priority assignments.

Several projects can happen simultaneously and at different times: they still follow a system and protocol to get finished.

Prioritize > Create Sprint Project > Use MSE Framework > Release



ONE PROJECT PLANNER

Managing Your Time

Ultimate Goal: _____ **by** _____

Mindset Mantra: _____

Administrator Focus: Scheduled Meetings, Calls, Emails, etc.

Time + Appointment with ... About ...	To Do items
:	<input type="checkbox"/>
:	<input type="checkbox"/>
:	<input type="checkbox"/>
:	<input type="checkbox"/>
:	<input type="checkbox"/>
:	<input type="checkbox"/>

Producer Focus: Value Creation

PROJECT:				
Role:				
Stakes: Reward/Consequence:				

Reflection

Things I Did Well So Far ...	If I Could Do It Over ...

Grateful

--

AGENDA

DO NOW

1.

2.

3.

DO NEXT or Schedule

1.

2.

3.

DO LATER or Delegate

1.

2.

3.

DON'T DO or Filter

1.

2.

3.

4.

To Do Brainstorm

List and then prioritize in
Do Now and Do Next.

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Morning Rituals

1.

2.

Evening Rituals

1.

2.

Grateful

1.

2.

3.

MONTHLY BUSINESS EXPENSES

The Cost Of Doing Business

Instructions: Carefully documenting your expenses is key to making costly mistakes. Below are the very basics of business finances for a new business. If you've been in business longer, you'll want to use software like [17 Hats](#).

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EXPENSES

Date	Source	Amount

Total Expenses for the month of _____ \$

INCOME

Date	Source	Amount

Total Income for the month of _____ \$

Net Income	Taxes	Take Home

MARKETING & BRANDING

The Psychology of Color

Instructions: As you know, color is symbolic, archetypal, and psychological. The color brands use can make people happier, calmer, or energized. Carefully plan out what colors you'll use by experimenting and doing research. Jot down both the color and Hex Code (what you'll use online).

- Entrepreneur Magazine's The Psychology of Color in Branding and Marketing <http://www.entrepreneur.com/article/233843>
- CoSchedule's The Ultimate Color Guide: <http://coschedule.com/blog/color-psychology-marketing/>
- Adobe's Color Explorer: <https://color.adobe.com>
- Color Palettes: <http://www.htmlhexcolor.com/> [Pay attention to the color schemes/groupings.]

Words That Describe My Brand

Corresponding Color



Possible Color Combo Sets

{

{

{

MARKETING & BRANDING

Branding & The Five Senses

Instructions: Connecting with customers on every level is important since it's hard to tell how they process your brand messages. Use all five senses in your marketing. Have fun with this exercise as you try to carve out a unique brand. Warning: these questions require you to think outside the box as they are odd. Later you can use these concepts in your marketing and ad campaigns.

SOUND

What does your brand sound like? What song is your brand anthem?

SMELL

What smell epitomizes your brand?

LOOK

What image is iconic with your brand?

TOUCH

What would your brand feel like if you touched it? What is its texture like?

TASTE

What does your brand taste like? If your brand were a dish, what would it be?

MARKETING & BRANDING

Brand Mood Board (example)

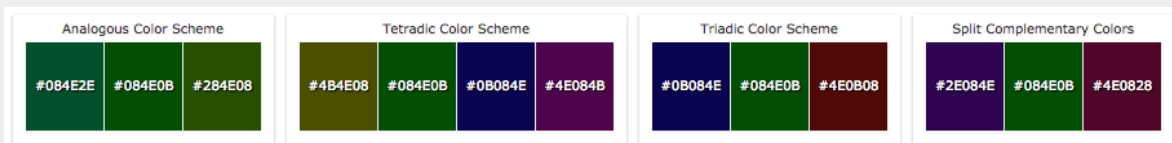
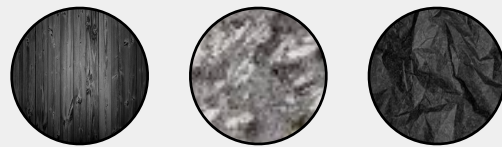
Instructions: Mood Boards are a way for companies to engage in the ongoing research and preferences of their brand. It's simply a board that collects items in specific categories that seem to capture the feel of the brand. In time, patterns of your brand emerge and these boards evolve into your official brand style book. Research Mood Boards on Pinterest to get ideas. Below is the basic idea.



Signature Colors



Patterns & Textures

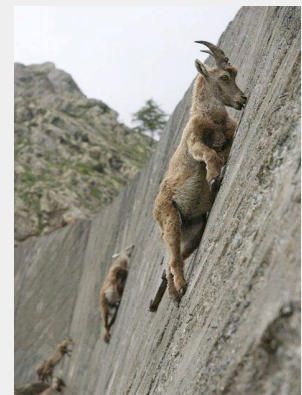
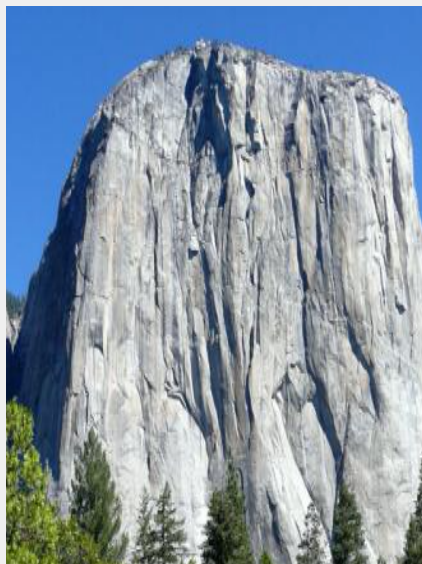


Typefaces

Montserrat: The quick brown dog jumps over the lazy fox.

Hoefler Text: The quick brown dog jumps over the lazy fox.

Brand Inspiration



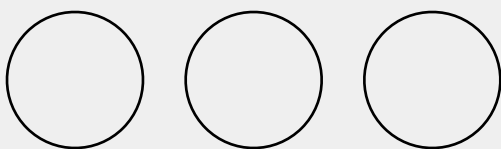
MARKETING & BRANDING

Brand Mood Board (blank)

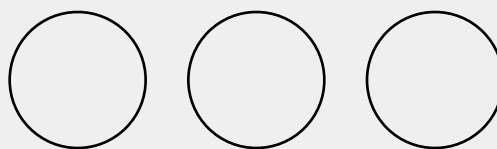
Instructions: Mood Boards are a way for companies to engage in the ongoing research and preferences of their brand. It's simply a board that collects items in specific categories that seem to capture the feel of the brand. In time, patterns of your brand emerge and these boards evolve into your official brand style book. Research Mood Boards on Pinterest to get ideas. Draft your mood board below.

[Logo]

Signature Colors



Patterns & Textures



[Color Palette Ideas]

<http://www.htmlhexcolor.com/>

Typefaces

[Great Font Pairings: <https://designschool.canva.com/blog/the-ultimate-guide-to-font-pairing/>

Create Your Own Font Pairings: <https://www.canva.com/font-combinations/>]

Brand Inspiration

[Go to Google Images and type 2-3 adjectives that perfectly describe your brand.

Do the same on Pinterest and Royalty-Free photo stock sites.

Post the best brand images below.]

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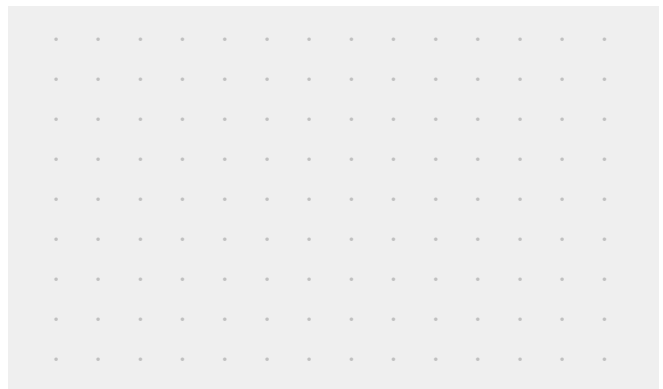
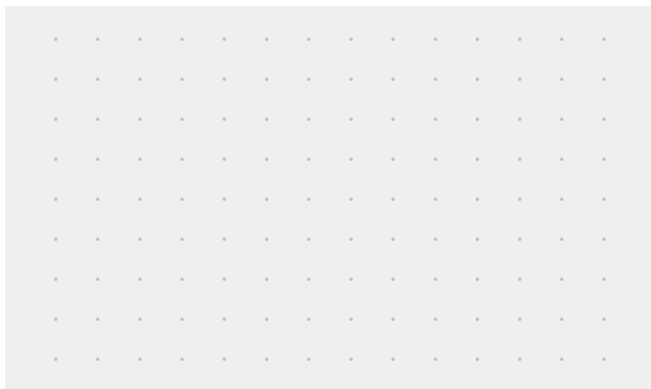
Logo Guidelines

Instructions: Coming up with a logo first is usually the biggest mistake rookies make. They want to start with logos, even before the company has established their DNA or validation in the market. This is often a waste of time. However, now that you have all the big elements of branding in place, creating a logo and finding “on brand” material will be easy. There are lots of sites and apps to create draft logo concepts.

Suggested Guidelines For Logos by Prof. Jennifer Aaker of Stanford University

1. **Memorable:** Distinct, easy recognized / recalled
2. **Meaningful:** Descriptive, persuasive
3. **Appealing:** Fun and interesting, rich visual & verbal imagery, aesthetic
4. **Protectable:** Legally, competitively [it's original]
5. **Adaptable:** Flexible, update-able
6. **Transferable:** Across product categories, across geographic & cultural boundaries.

Logo Sketches



My Logo Is . . .

1. **Memorable** because _____.
2. **Meaningful** because _____.
3. **Appealing** because _____.
4. **Protectable** because _____.
5. **Adaptable** because _____.
6. **Transferable** because _____.

MARKETING & BRANDING

Protecting Your Brand

Instructions: The world of business is highly competitive. Because of that, it's smart to protect your brand and company as much as possible--the sooner the better. Conversely, it's also good to check the United States Patent Office so you don't copy others! Below are spaces to put items that you might trademark, copyright, or patent. Check availability and registration at: <http://www.uspto.gov>.

Trademarks

A word, phrase, symbol, and/or design that identifies and distinguishes the source of the goods of one party from those of others. (Brand names and logos.)

Copyrights

Protects works of authorship that have been tangibly expressed in a physical form. (Protects original artistic and literary works. Think songs, books, movies, and blogs.)

Patents

A limited duration property right relating to an invention, granted by the United States Patent and Trademark Office in exchange for public disclosure of the invention.

SECTION 2

Your Tribe



MY TRIBE

Customer Data

Instructions: The goal here is to describe your ideal customer so well that you can anticipate their needs, thoughts, and actions. Once you are close to achieving this, you'll know how to write the copy on your website, newsletters, sales letters, and other marketing material. Customers will think you're talking just to them!

Geographics

Target Regions _____

Demographics

Age Range (10-15 year span only) _____

Race/Ethnicity _____

Gender _____

Education _____

Marital Status _____

Family Status _____

Generation _____

Rent or Own Home _____

Household Income Range _____

Psychographics

Pain Points _____

Values _____

Beliefs _____

Aspirations _____

Leisure Activities _____

Tech Preferences _____

Info Sources _____

Objections & Role In The Purchase Process

"Good To Know" Customer Information

MY TRIBE

Customer Watering Holes

Instructions: In order to know what's on your customer's minds and their pain points, it's a good idea to be where they're at. These are online and offline spots where they talk to other customers, buy products, and organize groups. You could deploy surveys, but often that's not enough. Below, list places where your customers have their guard down to discuss business and life. Be where they are. Don't be a spy, but rather an engaged, caring participant seeking to add value--not as a company but as a fellow member of the group.

Online

Location

Notes & Insights

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Offline

Location

Notes & Insights

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MY TRIBE

Personnel & Catalysts

Instructions: Great businesses are not build alone. Great people are much needed too! Below is a worksheet to help you identify rich assets you can utilize in your company. The Catalysts box refers to Malcolm Gladwell's book *The Tipping Point*. In it, he identifies three different types of influencers leaders should align with. Use the J2R System Catalysts worksheet to help you.

My "A" Team Personnel

Name	Role
_____ / _____	
_____ / _____	
_____ / _____	
_____ / _____	
_____ / _____	
_____ / _____	
_____ / _____	
_____ / _____	

Business Service Partners

LAWYER _____
Contact Info _____

ACCOUNTANT _____
Contact Info _____

BANKER _____
Contact Info _____

INSURANCE _____
Contact Info _____

BUSINESS CATALYSTS

Connectors

Salespersons

Mavens

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

MY TRIBE

Brand Stories & Company DNA

Instructions: All brands have a story. The timeline begins from the birth of an idea and continues until you close the doors. There are several types of brand stories you must tell over time (some are in the process so not much is there). Below are a few prompts you can play around with and use in your marketing.

Origin Story

Product Story

Customer Story

Data / Income Story

BONUS

Online Tools

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BLOG CALENDAR

Yearly Planner & Monthly Themes: Jan-Jun

Instructions: Consider what you're trying to achieve with your website. What kinds of traffic do you want to attract? What do visitors want to read? What content value can you provide? Now complete the following table.

	Theme	Topics	Keywords	Links / Influencers	Target Publications	Notes
JAN						
FEB						
MAR						
APR						
MAY						
JUN						

BLOG CALENDAR

Yearly Planner & Monthly Themes: Jul-Dec

Instructions: Consider what you're trying to achieve with your website. What kinds of traffic do you want to attract? What do visitors want to read? What content value can you provide? Now complete the following table.

	Theme	Topics	Keywords	Links / Influencers	Target Publications	Notes
JUL						
AUG						
SEP						
OCT						
NOV						
DEC						

BLOGGING

Blog Post Planner

Instructions: A good blog is not an accident. Careful planning is required to achieve the desired result. Below are a few things to consider before, during, and after your post. Work with this template until you get the hang of it.

BLOG POST 1

Call To Action

Due Date: _____ Topic: _____ Blog Type: _____
Category: _____ Author: _____ Other: _____
Keywords: _____

Possible Headlines

To Do

- Outline With Sub-Headings/Sections
- Draft
- Research
- Revise
- Check SEO and Links
- Edit
- Proofread With Speech Feature
- Add Images
- Get Feedback
- Schedule Post
- Promote & Maintain

Call To Action

BLOG POST 2

Call To Action

Due Date: _____ Topic: _____ Blog Type: _____
Category: _____ Author: _____ Other: _____
Keywords: _____

Possible Headlines

To Do

- Outline With Sub-Headings/Sections
- Draft
- Research
- Revise
- Check SEO and Links
- Edit
- Proofread With Speech Feature
- Add Images
- Get Feedback
- Schedule Post
- Promote & Maintain

Call To Action

BLOGGING

Blog Post Planner

Instructions: A good blog is not an accident. Careful planning is required to achieve the desired result. Below are a few things to consider before, during, and after your post. Work with this template until you get the hang of it.

BLOG POST 3

Call To Action

Due Date: _____ Topic: _____ Blog Type: _____
Category: _____ Author: _____ Other: _____
Keywords: _____

Possible Headlines

To Do

- Outline With Sub-Headings/Sections
- Draft
- Research
- Revise
- Check SEO and Links
- Edit
- Proofread With Speech Feature
- Add Images
- Get Feedback
- Schedule Post
- Promote & Maintain

Call To Action

BLOG POST 4

Call To Action

Due Date: _____ Topic: _____ Blog Type: _____
Category: _____ Author: _____ Other: _____
Keywords: _____

Possible Headlines

To Do

- Outline With Sub-Headings/Sections
- Draft
- Research
- Revise
- Check SEO and Links
- Edit
- Proofread With Speech Feature
- Add Images
- Get Feedback
- Schedule Post
- Promote & Maintain

Call To Action

BLOGGING

Blog Post Planner

Instructions: A good blog is not an accident. Careful planning is required to achieve the desired result. Below are a few things to consider before, during, and after your post. Work with this template until you get the hang of it.

BLOG POST 5

Call To Action

Due Date: _____ Topic: _____ Blog Type: _____
Category: _____ Author: _____ Other: _____
Keywords: _____

Possible Headlines

To Do

- Outline With Sub-Headings/Sections
- Draft
- Research
- Revise
- Check SEO and Links
- Edit
- Proofread With Speech Feature
- Add Images
- Get Feedback
- Schedule Post
- Promote & Maintain

Call To Action

BLOG POST 6

Call To Action

Due Date: _____ Topic: _____ Blog Type: _____
Category: _____ Author: _____ Other: _____
Keywords: _____

Possible Headlines

To Do

- Outline With Sub-Headings/Sections
- Draft
- Research
- Revise
- Check SEO and Links
- Edit
- Proofread With Speech Feature
- Add Images
- Get Feedback
- Schedule Post
- Promote & Maintain

Call To Action

WEEKLY SOCIAL MEDIA PLANNER

Instructions: Fill in the target metric and goal for each social media platform (e.g., fans, retweets, comments, etc.) In the boxes add ideas to share & promote. You can schedule & automate these updates with Buffer, SocialPilot, etc.

FACEBOOK // Target Metric & Goal: _____

--	--	--

LINKEDIN // Target Metric & Goal: _____

--	--	--

TWITTER // Target Metric & Goal: _____

--	--	--

PINTEREST // Target Metric & Goal: _____

--	--	--

WEEKLY SOCIAL MEDIA PLANNER

Instructions: Fill in the target metric and goal for each social media platform (e.g., fans, retweets, comments, etc.) In the boxes add ideas to share & promote. You can schedule & automate these updates with Buffer, SocialPilot, etc.

SNAPCHAT // Target Metric & Goal: _____

--	--	--

GOOGLE + // Target Metric & Goal: _____

--	--	--

OTHER _____ // Target Metric & Goal: _____

--	--	--

OTHER _____ // Target Metric & Goal: _____

--	--	--

EASY WEBSITE SETUP CHECKLIST

Instructions: Websites these days are easy to set up and use. Once set up, there are thousands of great themes out there to customize your brand and promote your products. This checklist will show you how to set up the most popular content management system (CMS), WordPress.

You'll Need 3 basic Items:



1. Domain Name

What is it? It is the web address to your site. (www.Company.com)

GoDaddy,
NameCheap,
HostGator, 1and1,
etc.

Cost: \$0-10/year



2. Hosting

What is it? It powers and organizes everything on your site.

GoDaddy,
[DreamHost](#),
[HostGator](#), [WP Engine](#), etc.

Cost: \$3-19/month



3. Wordpress

What is it? It is the content management system for your site.

This is a one-button install feature on most hosting services.

Cost: \$0

[Bonus: Step-By-Step Set-Up Video](#)

GREAT WP THEMES

Free

- ◆ "Allegiant" by CPO Themes
- ◆ "Sydney" by Athemes
- ◆ "2017" by Wordpress
- ◆ "Olsen Light" by CSS Igniter
- ◆ "Editor" by Array
- ◆ "Arcade Basic" by Bavotasan

Premium

- ◆ "Ultra" [Themify](#)
- ◆ "Flatshop" [Themify](#)
- ◆ "Sydney Pro" by Athemes
- ◆ "Armada" by Dream Theme
- ◆ "The7" by Dream Theme
- ◆ "X" by ThemeCo

RECOMMENDED FREE WP PLUGINS

Akismet by Automatic
All-In-One WP Security by Tips & Tricks HQ
BackUpWordpress by Human Made Ltd.
Broken Link Checker by Janis Elsts
Favicon by FaviconGenerator

Elementor
WP Smush by WPMU Dev
Child Theme Configurator
PageSpeed Ninja
Yoast SEO by TeamYoast

4-STAGE SALES FUNNEL

Example Funnel

Instructions: Based on your business and goals, use the following example to generate ideas for your systematic sales funnel. This funnel can be automated with tools such as email auto-responders and online courseware services.

1. Lead Magnets (Free)

Valuable asset that solves a common surface pain.

GOALS: Email Collection + Give Incredible Value First

2. Small Product (Free or \$)

High value asset that solves a current, surface pain.

GOALS: Give Value & Deeper Branding. Solve a problem well with greater detail.

3. Signature Products (\$\$)

High value asset that solves a single root-cause pain.

Product captures essence of signature system.

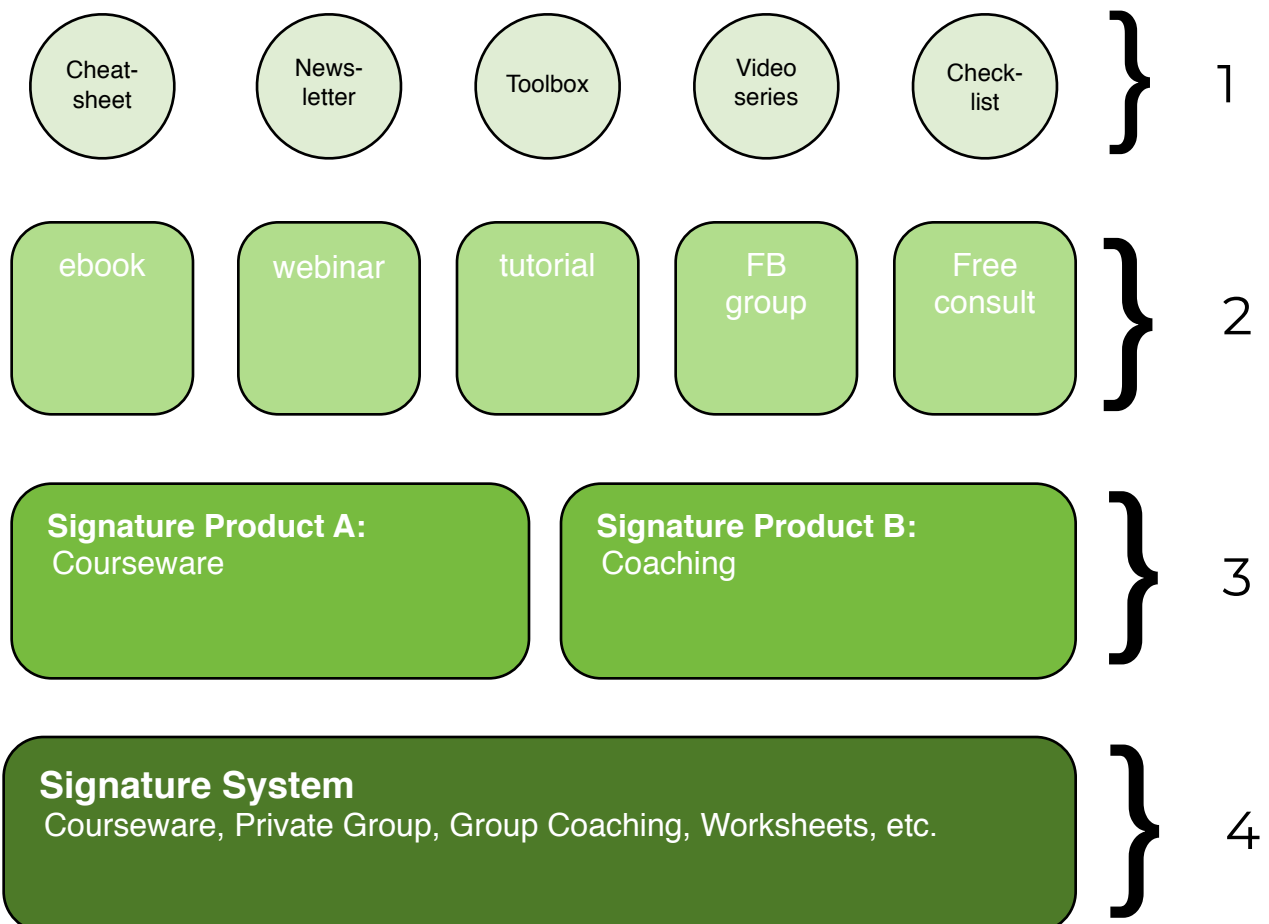
GOALS: Signature solution with a highly original product. Greater detail and focus on target.

4. Signature System (\$\$\$)

High value asset that solves many root-cause pains.

Product is entire signature sys. Some personal time.

GOALS: Complete Signature system. Solve a problem well with greater detail.



4-STAGE SALES FUNNEL

Idea Generator For Online Businesses

Instructions: Online businesses are a mix of give and take. First, it's best to give incredible value first for free. As a relationship develops and prospects are moved from one awareness phase to another, you can start offering greater value for a price. Also, at each phase you are testing your product ideas, gathering information, and building your email list.

In the blank objects below, write in what value you'll offer for each stage.

1. Lead Magnets (Free)

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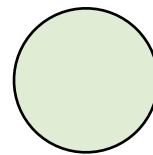
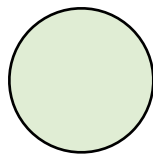
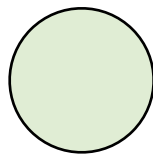
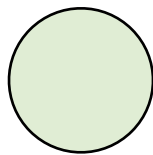
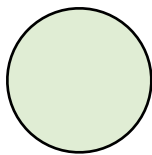
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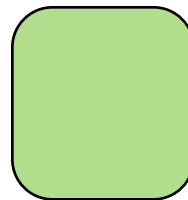
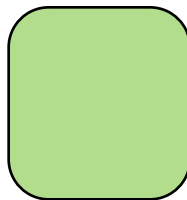
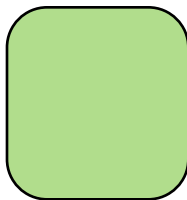
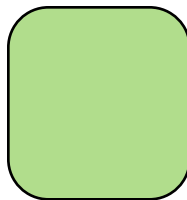
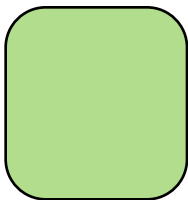
High value asset that solves many root-cause pains.

Product is entire signature sys. Some personal time.

GOALS: Complete Signature system. Solve a problem well with greater detail.



1



2



3



4

NEXT STEPS

Last Words & Thank You!

Final Instructions: Tools are never useful when not used. Use these tools. Modify them. Apply them to your work. We must err on action. The thinker, dreamer, and planner play a key part in business success. However, it is the doer that is not afraid of imperfect action and results that achieves greatness.

Created by
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I'm a business consultant and writer who loves to help entrepreneurs and creatives obtain greater focus and fulfillment in their lives through story. I have worked with private clients, personal brands, and global companies. My business is based in Portland, Oregon—a magical and mysterious city enveloped by a Douglas Fir rainforest.

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