

How to
Write
A
BUSINESS PLAN
Like A
Boss

IN 9 SIMPLE STEPS

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Hey Queen... Glad to see you!!

So excited you are here!!! That means you are ready to take your business to the next level! Filling out this Business Plan Template will give you the clarity you need about your business to get on the right path to success!

What is a Business Plan?

A business plan is an essential step-by-step Roadmap for any successful business. This living document generally projects 2-6 years ahead and explains present and future goals which include Branding, Marketing, Investments, and Productivity. After reading your business plan the reader should know your business goals, your reasoning for pursuing these goals, and how do you plan on reaching them. Seriously...without one of these babies... you aren't considered an Entrepreneur. Thank goodness I put together this simple document for you!

I got you Queen!

Don't let the list of business planning sections intimidate you. You don't have to write the whole plan in one sitting, and you will find that each section is simpler than it looks. Your business may not require each section of this plan; you'll be the one who determines how much to include. However, each section you write is IMPORTANT and should be completed before you invest a substantial amount of time or money in your business! If you have already...Don't fret...Keep reading!

When filling out this document make sure that you write down **EVERYTHING**...and I do mean **EVERYTHING** that comes to your mind. No matter how small or silly you think it sounds. The first time you fill this out will seem like a brainstorming session...**THAT'S GREAT!!** The secret is to get it **DOWN** ...**THEN** get it **RIGHT!** We'll sort out all the fluff later.

Simply writing down your business plan will accomplish many things:

Give you clarity around your business to ensure proper branding.

Discover and analyze your target audience's need and determine the best solution.

Allow you to strategize monetization that best fits your brand.

Help you budget for your business and not overspend.

Guide you through future decisions on how you will promote & grow your business.

Proper planning is absolutely 100% essential for any portion of your small business to succeed.

A thorough business plan will help you avoid major obstacles and will guide your decisions unlike any other document. When considering a new idea, upcoming event, customer request or suggestion, expansion, marketing opportunity, or any other operational item, you will have this plan to consult.

Quick tip:

I recommend reading through your business plan at least once each month. This will keep you focused on your goals as well as remind you of the objectives that you should be mindful of.

Writing tip:

You can write your business plan in any order you wish. I found it easier to start with the sections I was most excited about, which got my ideas and energy flowing. Try gradually filling out one section a day.

Business Plan Outline

1.0 Brand Summary

- 1.1 Vision Statement
- 1.2 Mission Statement
- 1.3 Your "Why"
- 1.4 Core Values

2.0 Brand Goals

- 2.1 Objectives
- 2.2 Keys to Success
 - 1. 3 Months
 - 2. 6 Months
 - 3. 12 Months
- 2.3 Platform + Expansion Goals

3.0 Target Audience

- 3.1 Ideal Customer/Client
- 3.2 How'll locate them
- 3.3 How'll gain their trust

4.0 Offerings + Monetization

- 4.1 List of products & service with prices
- 4.2 List materials/tools you may need
- 4.3 Where will you sell your items?
- 4.4 Affiliates + Partnerships
- 4.5 Any other monetization methods

5.0 Process

- 5.1 Business process - Steps of production

6.0 Market & Avatar Analysis

- 6.1 Leading businesses in your niche
- 6.2 Comparable businesses in niche
- 6.3 Traffic Goals

7.0 Social Promotion Strategy

- 7.1 What 2-3 social media channels will you focus on?
- 7.2 How will you build your client base?
- 7.3 What advertising methods will you use?

8.0 Financial Strategies

- 8.1 How will you fund your business?
- 8.2 Start up Budget
- 8.3 What are your financial goals for your business?
- 8.4 Monthly Revenue Streams & Expenses

9.0 Expansion Goals

- 9.1 Continuing Education
- 9.2 Growth

The Break Down

1.0 Brand Summary

1.1 Vision Statement

A vision statement is an inspirational and practical statement that gives a clear picture of your business's purpose. To answer this questions consider the answers to the following questions: Why does this business exist? Where do I see it going in the future? What are my long-term core values and plans? How do I want society to view my business?

1.2 Mission Statement

Your mission statement is the heart of your business. It should set you apart from other businesses in your niche and should show the strategies in which you will accomplish your overall vision. Answer questions such as: What are my responsibilities and commitments to my readers? What is my "culture" and how will it show through? How will I practically accomplish my vision during day-to-day operations?

1.3 Your "Why"

Your why is your purpose. That burning desire inside of you. It's your reason for getting up in the morning. It's what motivates you to take action. It keeps you focused each and every day. No one has the power to take your purpose from you. Every individual has a purpose. While you may not have been able to identify your purpose just yet, it does not mean it does not exist. If you are constantly stressed, demotivated, unfulfilled at work, pessimistic of the world, or feel your life lacks meaning then these are clear indicators that you are not living your purpose. The good news is that it is never too late to find your purpose. I just found my purpose less than five years ago. Although once I did, I can honestly say I have never been happier and life has never been more fulfilling, both personally and professionally.

1.4 Core Values

Our core values are the things that define us and bring us back to our center where we are our most authentic self. We are talking about your morals, your principles, your guidelines...the things that make you...YOU. Determine a list of core values for your business...If you don't know where to start read my article [What's At Your Core?](#)

Our core values help to define the "culture" of our business. If your business was a person what attributes will it have? What personality traits will you show your audience? What style and tone will your marketing materials be written in? What type and quality of images will you use?

2.0 Brand Goals

Now that you evaluated who you are...let's get into your future goals for your business. Don't focus on the how for right now just write down the goals you want to achieve. Make sure you dig deep and get all your aspirations out. If you can dream it you can achieve it! (Corny...BUT true!! lol)

2.1 Objectives

List three objectives for your business: One small goal, one medium size goal, and an ENORMOUS ONE!! I call this the stair stepper goal setting progress. As you achieve your first goal you will feel accomplished and then by the time you achieve your enormous goal you will feel pretty BadAss! Make sure your objectives are S.M.A.R.T. Read my article on smart goals

Below are examples of objectives for an essential oil business:

- Grow website traffic by at least 5% each month.
- Find four supporting product vendors who will purchase ad space on website within the first year.
- Self publish a unique essential oil recipe and informational lookbook which will be sold on Amazon.

2.2 Keys to Success

Keys (or crucial items) directly related to your business' success. You will list three keys each for 3 months, 6 months, and 12 months. Be sure to choose items that are vital for growth. Choose keys to success that will make your objectives from the previous section possible.

Here are some keys to success for our fictional essential oil business:

- Establish a following on Facebook with the holistic community through the use of Facebook ad campaigns.
- Develop eye-catching designs for storefront, packaging and social media materials.
- Create a following on Pinterest that will share and promote our unique brand of essential oil products, look books, images, product pages, and humor in a way that will keep our company on the minds of our target audience.

2.2.1 3 Months

2.2.2 6 Months

2.2.3 12 Months

2.3 Platform + Expansion Goals

Decide the type of platform you are creating through your business and any goals for expansion you have for the next one to five years and beyond. Do you want to build a community around your brand? Develop a platform for speaking engagements or a book? Attract enough people to your products/services to make a full-time income? Connect with like-minded people and share your thoughts? Establish your expertise in your field?

3.0 Target Audience

This section is sooooooo important!!! I can not tell you how many people have a business but they do not know who they are marketing to!!! Which means they market to everyone.. And sorry to break the bad news.... YOU ARE NOT FOR EVERYONE...and everyone isn't for you! Define and discover who your target audience (Also called "Avatar") is.....Who are you doing this for? Who will ideally benefit from your business? Get VERY SPECIFIC on their demographics, preferences, social habits, financial habits. The more detailed you are that more you will be able to align all your marketing attempts based on them.

3.1 Ideal Customer/Client

Male? Female? Basic demographics? Preferences and habits?

3.2 How'll locate them

Where does your avatar shop? Where do they look for information and entertainment? How and where will they find your business? What are their social media habits?

3.3 How'll gain their trust

Based on your Avatar, write out at least five benefits that potential clients can experience from working with you. What sets you aside from other businesses? How will you 'WOW' your clients so they can return for more!

*You should probably list some of what makes you unique on your website as well as in your social media accounts and marketing materials.

4.0 Offerings + Monetization

4.1 List of products & service with prices

What products are you planning to provide your clients with? Physical? Digital? Books/Ebooks? Where will they be housed? Who will they produce the products? What will be the packaging design?

4.2 List materials/tools you may need

Being an entrepreneur means being resourceful. There is a ton of online resources to make your life easier. Think of what tools you may need to gain revenue, and long term, passive income. Online tools, software, assistant?

4.3 Where will you sell your items?

There are so many selling platforms you can use. A warehouse? Shopify? Amazon? Strictly on your website?

4.4 Affiliates + Partnerships

Affiliates and partnerships are very useful in business. Affiliate marketing involves a merchant paying a commission to other online entities, known as affiliates, for referring new business to the merchant's website. Affiliate marketing is performance-based, which means affiliates only get paid when their promotional efforts actually result in a transaction. When choosing an affiliate be sure that they fit with your brand and culture.

Note: Write out the ways in which you will incorporate products for sale, partner programs and ads into your content. Will you mention products on a website? If so, where? In posts, link to them from your sidebar, make a tools or recommendations page on your blog, a combination of all?

4.5 Any other monetization methods

. . . such as sponsored subscriptions and memberships.

5.0 Process

5.1 Business process

List the steps of production. What are the daily tasks you need to perform to keep your business running? What are the processes for each product/article/video/book you are planning to make? This section can seem rather extensive but this is your bread and butter of your business. You may be updating this section frequently as you experience trial and error...Dont worry!! This is will be so valuable in the long term especially if you plan on selling your business in the future.

6.0 Market & Avatar Analysis

This section is all about research..so be prepared. How can you create an amazing business if you aren't sure of what's already out there! Don't think if it as competition because NO ONE will do your business how you will!

6.1 Leading businesses in your niche

Analyze 5 – 10 of the leading business in your niche. Record 3 – 5 key points of what the businesses do extremely well and 3 – 5 points on things you might do to grow/change these businesses if they were yours. It shouldn't be used to make you feel good or bad about your web presence, but to see what others are doing, support their efforts, and start interacting with them, they might be interested doing business with you.

6.2 Comparable businesses in niche

Do the same thing in this section as the previous one but for the businesses comparable to yours. Comparable such as business status, niche, development, and target audience.

6.3 Traffic Goals

Your objectives in Section 2.1 might not have been about website traffic (If you are utilizing one), but even if some of them were, write down some traffic goals in this section. You'll be able to set realistic, exciting goals for your website. You can aim to increase your overall traffic levels, the amount of quality traffic you get (visitors who stay at least X minutes on your site), or you can even try to track the effectiveness of certain links and paths through your site.

7.0 Social Promotion Strategy

A wealth of information exists in the form of blog posts, books, and courses to help you learn how to utilize social media for your business. I recommend developing a plan to work on "getting good" at one or two platforms at a time. Take a class, read, and focus until you become comfortable with each platform, then move on to focusing on new ones. This is not to say you can't or shouldn't be using the other ones while you learn...social media management can be overwhelming and starting gradual is recommended.

7.1 What 2-3 social media channels will you focus on?

Record the details of how you will use each account, general guidelines, scheduling, image sizes and styles, and more.

Once you've researched and thought about the best ways to use each platform, tie them all together into one overall strategy and any guidelines or consistencies you want to see across each platform.

7.2 How will you build your client base?

How often will you engage your target audience? What social media posts will you use to appeal to your clients? Will you send out weekly newsletters?

7.3 What advertising methods will you use?

It seems crazy to even think of offline marketing techniques sometimes when there is so much you can do online, but even though you are promoting a digital space on the World Wide Web, there are likely still things you can do in real life to promote your brand: business cards, speaking engagements, magazine ads, promotions at related fairs or events, partnerships or sponsorships of activities in your community, and more. Think of at least 3 – 5 things you can try that don't involve an Internet connection.

8.0 Financial Strategies

Time to get creative! This section scares a lot of people and holds them back...BUT you've got this!

8.1 How will you fund your business?

There are AT LEAST 25 side hustles you can have to fund your business. If you don't want to go that route you can always use inventors and fundraising. What route will you take?

8.2 Start up Budget

Itemize the things you will need to launch your business.

Consider items such as:

- logo and brand identity designs
- website hosting and domain name
- business cards and other promotional materials
- monthly Internet fees
- business formation expenses (LLC, sole proprietorship, etc.)
- new software or computer
- office supplies or office furniture
- materials and inventory to make cool stuff (DIY projects, recipes, etc.) for your audience

8.3 What are your financial goals for your business?

What does your revenue streams look like? What percentage of revenue do you want to be making from each revenue stream?

8.4 Monthly Revenue Streams & Expenses

Create a spreadsheet or table of all the revenue streams your business will have. As you get used to the process of selling your goods/services, creating effective advertisement or affiliate relationships, etc., you will start to see your revenue grow. Record your monthly income from each source. This will help you notice trends over time, get rid of ineffective partnerships, and capitalize on ideas that are working well for you.

9.0 Expansion Goals

9.1 Continuing Education

Just as lawyers and doctors have continuing education (CE) classes they must take, I like to promote CBE—continuing business education. Set some goals for continually learning how to become better in business as well as how to grow in your niche/abilities.

This may come in the form of finding five business tips blogs to follow, finding five or more resource sites in your field to learn from, taking some classes or other seminars and trainings, or going to school to learn more about a particular topic.

9.2 Growth Plan

Accomplishing goals is fun. Reaching milestones, no matter how “small,” can be the push we need to keep going during an unpleasant moment or it can be a sweet affirmation that we’re doing what we’re “supposed to be doing” with our lives.

Record several milestones you want to reach in growth and sales. Examples: Reaching 100 visitors per month, then reaching 10 per day, then 1,000 per month and so on. Or, selling your first eBook, then selling 5 eBooks per month, then 100 per year, etc. Other examples might be reaching a certain level of monthly income, or earning enough to buy a new computer. You get the point. Celebrate!

You are spectacular for making it through this process. Now it's your turn use the previous sections to help guide you through completing your Business Plan. Ready...Set....GO!

1.0 Brand Summary

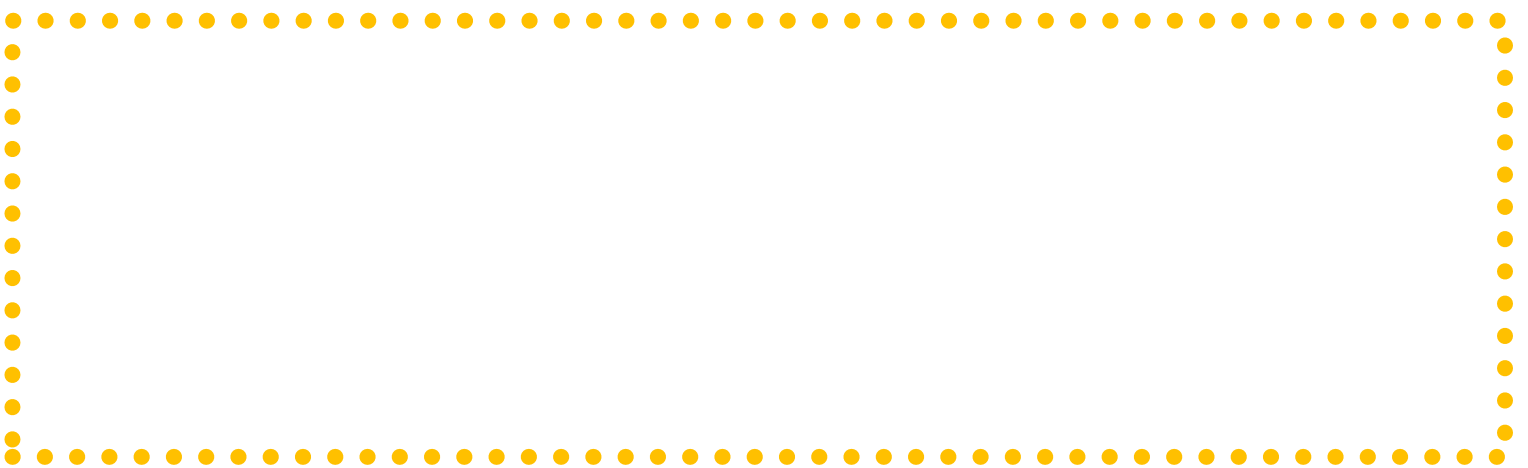
1.1 Vision Statement



1.2 Mission Statement



1.3 Your "Why"



1.4 Core Values



2.0 Brand Goals

2.1 Objectives



2.2 Keys to Success

1. 6 Months



2. 1 year



3. 5 years



2.3 Platform + Expansion Goals

3.0 Target Audience

3.1 Ideal Customer/Client

3.2 How'll locate them

3.3 How'll gain their trust

4.0 Offerings + Monetization

4.1 List of products & service with prices

4.2 List materials/tools you may need

4.3 Where will you sell your items?



4.4 Affiliates + Partnerships

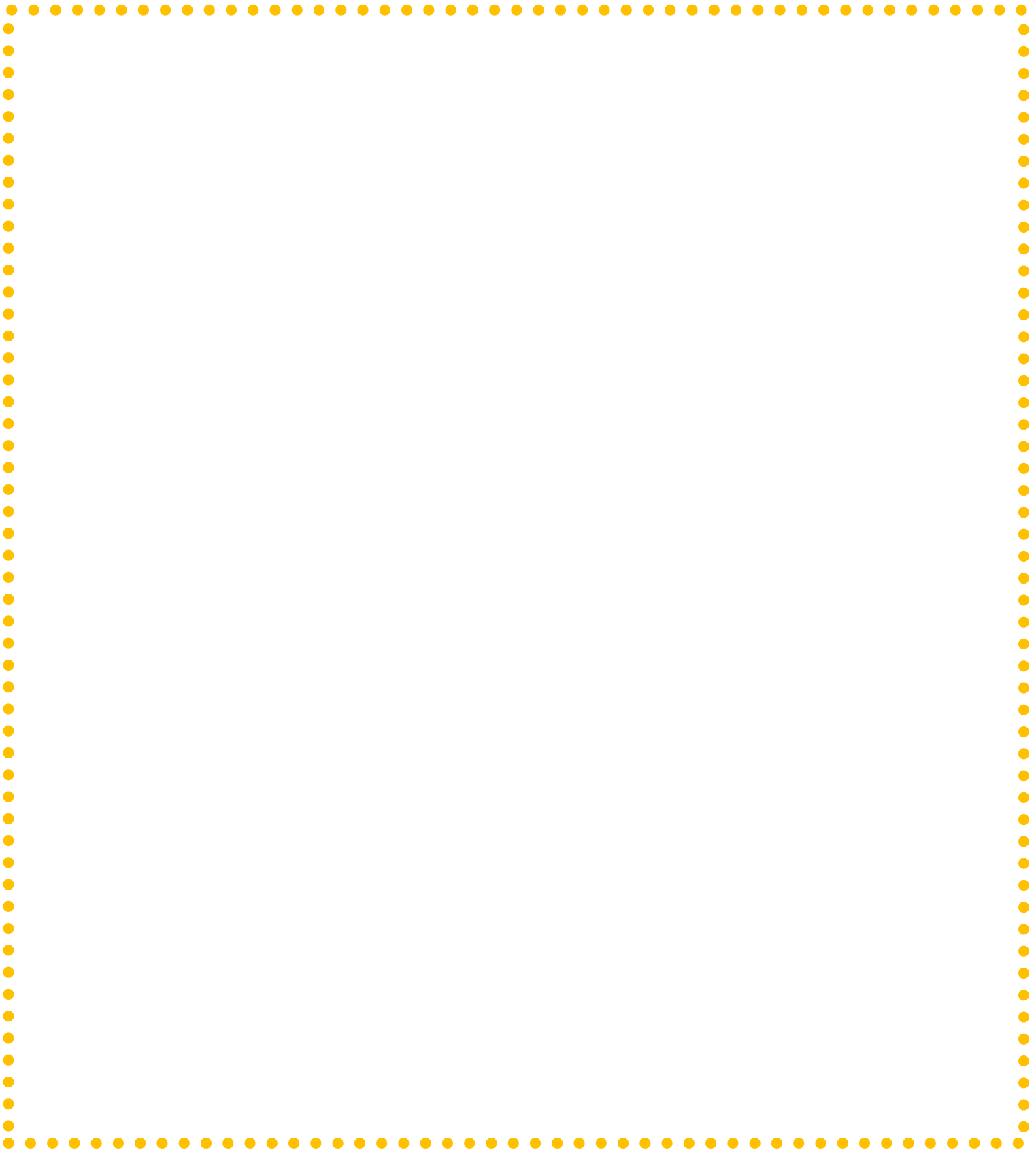


4.5 Any other monetization methods



5.0 Process

5.1 Business process - Steps of production



6.0 Market & Avatar Analysis

6.1 Leading businesses in your niche



6.2 Comparable businesses in niche



6.3 Traffic Goals



7.0 Social Promotion Strategy

7.1 What 2-3 social media channels will you focus on?



7.2 How will you build your client base?



7.3 What advertising methods will you use?



8.0 Financial Strategies

8.1 How will you fund your business?



8.2 Start up Budget



8.3 What are your financial goals for your business?



8.4 Monthly Revenue Streams & Expenses



9.0 Expansion Goals

9.1 Continuing Education

9.2 Growth Plan

HEY!

DON'T BE A STRANGER!

I'd love to hear your business successes! Share your story or let me know how I can help you build a successful business.

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