Digital Business Digital Planner

Preview: file inventory and watermarked sample pages. Not the full product.

Files in the download

Business-Planner-Printable-Letter.pdf
Printable edition, US Letter portrait, 107 pages, 0.65 in margins.

Business-Planner-Digital-Hyperlinked.pdf
Hyperlinked digital edition, landscape 4:3 for tablets, 107 pages with side tabs and 1079 internal links.

Business-Planner-User-Guide.pdf
How to print, how to navigate the digital edition, and tips (2 pages).

README.txt
Quick start and license summary.

Business goals & KPIs

ANNUAL GOALS

GOAL	WHY	DEADLINE

KEY NUMBERS

METRIC	TARGET	Q1	Q2	Q3	Q4
Revenue					
Profit					
New clients / customers					
Average order / project value					
Email subscribers					
Website visits					

SAMPLE

Monthly finances

Month 1 of 12

Month _____ **Year** _____

INCOME

SOURCE	EXPECTED	ACTUAL
Product / service sales		
Client projects		
Retainers		
Affiliate / other		
Total income		

EXPENSES

CATEGORY	BUDGET	ACTUAL
Software & subscriptions		
Marketing & ads		
Contractors		
Supplies & materials		
Payment / platform fees		
Shipping		
Education		
Taxes set aside		
Other		
Total expenses		

SAMPLE

RESULT

Total income - total expenses = profit _____

Profit margin (profit / income x 100) _____

Biggest win _____

Change for next month _____

Week 1: _____ / _____

	MON	TUE	WED	THU	FRI
Meetings & calls					
Client work					
Marketing					
Admin					

TOP 3 OUTCOMES

- [ ] _____
- [ ] _____
- [ ] _____

REVENUE TASKS

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

FOLLOW UP WITH

_____

_____

_____

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_____

_____

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SAMPLE

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