



# Step-by-Step Business Planner

a workbook to help you plan out your creative business  
so that you can accomplish your dreams and achieve your goals!

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# Hi friend!

I am so excited to have you join me in planning out your best year yet! I have been hard at work to create this easy to use, step-by-step plan that will help you layout the next year in your business. No matter if it is the beginning of the calendar year or almost Christmas, this guide will work for you.

This guide serves as a basis to help you brainstorm, and figure out things for yourself. And if we aren't continuously working to improve and grow within our business, then we are setting ourselves up to fail. We are going to work together to make sure that at this time next year, you can look back and be suuuupppper proud of the awesome year you had!

Sound like a good plan? Then let's not delay any longer!

If you have any questions, or need help along the way, feel free to reach out. I love working alongside businesses in order to help creative entrepreneurs conquer their to-do lists!

Your Biz Sidekick,  
Madison Fichtl

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# Guidelines for Success

Just a few suggestions on how to make this workbook really help you out. I promise - no crazy rules or demands here!

# *Use what you want*

Use this entire workbook, or just print pages that you need. The idea for this workbook is to give you a space to scribble, scratch, erase and make sense of the ideas in your head. Once you've completed your planning, you can transfer it to your planner, Online calendar, or other planning tools. Print and use this workbook as often as you like!

# *Nothing is forever*

I created this workbook to help you work through your brainstorm and jot down your ideas. Coming up with goals can be really scary- trust me, I get it! But just know that nothing is permanent. Just because you have a goal now, doesn't mean that goal can't change and adapt in the future! Each and every day we have the opportunity to grow and learn- and our goals are going to grow (and change) with us!

# *Celebrate your Accomplishments!*

It can be really fun to celebrate your accomplishments (and look back on them!) So keep this workbook around and refer back to it in the future - you will be surprised how much you have grown and changed! And if you don't quite reach what you had set out to - don't worry! It's can be good to see if you're having troubles staying on track with your goals. These are opportunities for us to ask ourselves the serious question about whether or not we are over-achievers, or not staying motivated.

Overall, just have fun!

# Determining your Target Audience

As a business, it is so important to know who your target audience is! If you already are well aware of who this "person" is then skip this section. If not, you gotta do this!

# Target market

What problems does my business's product or service solve?

Who are my current customers?

Are these customers my ideal clients? If not, what does an ideal client look like? How old are they? What is their income bracket? Education? Marital Status? Family Status? Location?

What do my customers gain from choosing me (instead of the competition?)

Get down to  
business...  
Brainstorm!

Use the space on the next page to brainstorm any ideas that you might want to accomplish for the next year. These could be courses you want to take, skills you want to learn, or areas of your business that you want to expand. Nothing is off limits here! Let your imagination go and write down whatever comes to mind!





# Annual Business Goal Time

Now that you have captured all of your ideas, it's time to put those ideas into action. Determine which ideas that you want to focus on for the year and set dates for those. For example: you might want to create an online course, what month do you want that course to launch? And if you have financial goals (such as make \$X a month) then set a date you want to accomplish this by.

# Annual Goals

January

February

March

April

May

June

July

August

September

October

November

December

# Personal Goals

After focusing on the business side of things, now it's time to focus on you! Let's use the next page to document what you want to achieve personally. This might include courses that you want to take or skills you wanted to learn. Make sure to set goal dates for these as well!

# Personal Goals

This year, for myself, I want to accomplish (insert goal) by (insert date):

Goal	Deadline
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____

To accomplish these goals, I need to do the following:

<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____

Priorities:

# Project Plans

Let's break it down y'all! Now that we have our goals outlined and set, we need specific plans on how we are going to go about achieving these goals! Print out a project plan for each big goal you have. Then work on setting "mini-goals" that will help you work towards achieving the greater goal. Sound good? Let's do this!

# Project plan

My Project

Big Project Goal

Task	Deadline	Due Date
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____

Content Upgrade Ideas:

Social Media / Marketing Ideas:

Blog Post Idea Brainstorm:

# Weekly + Monthly Check-in

Print one of these sheets for every month. I use these to keep myself accountable and make sure that I am sticking to the plan that I set forth in order to accomplish my goals. After all, writing things down helps us keep better track of them. Don't believe me? Give it a try for a month!



# Monthly Report for:

## Monthly Goal

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Weekly Goal

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What worked well this month?

What didn't work so well this month?

What can I do differently next month?

Revenue Earned:

Goals Achieved this Month:

Notes:

# Quarterly Check-in

Use these sheets to check in with yourself quarterly (every 3 months).  
Checking in quarterly will make annual reporting much easier!

**Quarterly Report for:**

**Revenue earned:**

This Quarter I Completed:


Next Quarter I need to:


Notes:

# Yearly Check-in

You did it! It is time to check in on the past year! But first, give yourself a big-ol high five! You deserve it for making it this far! Use the next page to document your experiences from the previous year and help you plan for the next year.

# Yearly Reporting

This year, I accomplished:

I didn't complete the following goals:

What worked well for me:

What didn't work so well:

# Yearly Reporting

Next year, I plan to:

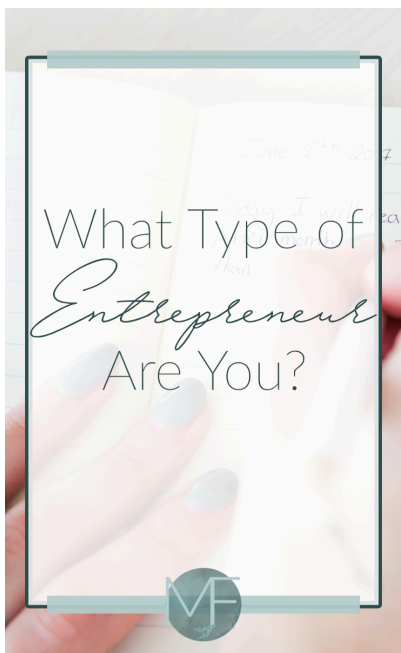
Blog Posts Published:

Revenue Earned:

Notes:



I sure hope you found this workbook helpful! Be sure to visit the blog and learn more about how you can be a better blogger and business owner. I have some great posts that just might help your business!



Be sure to follow along with me on the social networks below and let me know how your progress with the workbook is going!

Your Biz Sidekick,  
Madison Fichtl

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