

Ecommerce Success Planner

Year:

Quarter:

Name:.....

Dedicated to all entrepreneurs striving to succeed in business and life.

@2021 Veronica Jeans & Amanda Jeans

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How To Start

Why are goals in business so important?

Goal-setting is a powerful tool for figuring out what your ideal future could be, as well as motivating yourself to make sure it becomes reality.

In order to measure your success in business, you need specific goals. Most entrepreneurs, however, do not link their goals to their weekly and daily tasks. As a result, we lose focus and fail to achieve the results we desire.

Your business goal is to make money. This E-commerce planner is designed to help you be more productive and achieve the results you want, resulting in more sales, more customers, and more conversions for your business.

Our focus in this planner is on growing your e-commerce business, which means getting customers onto your website to purchase your products. The best way is to have an omnichannel approach that includes creating brand awareness, communicating with customers, improving and optimizing your website/store, and getting sales.

For you to visualize and understand how to use this powerful tool, we created detailed video tutorials as well as a book on **Ecommerce Business Planning** that will help you maximize the results you will gain from using this planner.

All of these extra tools are available at **E-commercePlanner.com**

What is next?

The following is a general outline of your step-by-step plan for you to stay in the lead. EACH step of the planner will have examples at the back for you to get ideas.

Step 1. ENVISION YOUR YEARLY GOAL / *Live Your Dreams*

Make a list of your annual goals and goals for your business and make sure you follow the steps in the five sections called SMART goals. Your annual goals can include personal and other goals but our main objective with this planner is to achieve success in your e-commerce business and make it as easy as possible to follow and keep up.

Your goal was to make money by starting a business.

The big question is: how much income do you want to generate in your business this year.

Step 2. CREATE YOUR 90-DAY GOALS / *Quarterly Goals*

Ambition and planning go hand in hand with 90-day goals. Why 90 days? You have 4 quarters in a year, with different seasons and sales cycles in the year.

The 90-day planning process allows you to break down your annual goals into 90-day goals, four-weekly stretches, and then weekly sprints. Select one to three projects for the next 90 days.

Your goal in this step is to determine how many sales you want to generate in 90 days and what are your action steps to achieve this. It all boils down to time, resources, and budget.

In addition, you will decide where you want to sell and what you want to sell, as well as how you are going to get your sales.

Step 3. DECIDE YOUR MONTHLY PROJECTS / *Every Month Moves Your Forward*

You will create the next projects every month toward your 90-Day goal. We have three monthly cycles. When you get to this point, you will start by calculating the time, resources, and budget to attain your goals. Every month can be a different theme, promotion, and SMD (sales, marketing, and distribution) channel. You need to decide your theme and promotions if you stick with the same SMD.

In this step, you decide whether you want to batch your tasks for the month or create them weekly and automate some of them.

There are some tasks that are not suitable for automation. Optimizing your store and website should be done daily and weekly, and this action cannot be scheduled.

Here are the steps to create the flow to your customers:

- Choose your social channels
- Decide what your calendar needs to track
- Make a content library for your assets
- Establish a workflow
- Start crafting your posts
- Start publishing/scheduling

RINSE & REPEAT

Step 4. DAILY TASKS / *Daily Action Creates The Forward Momentum*

You will create 1 - 3 main tasks to complete every day, so you can move forward to your next monthly sprint to achieve your monthly goals.

We have created a list of possible tasks to complete every day, because it is not possible to **schedule** some of your daily tasks. These will be to engage and commenting on your posts, updates on your website/store, and communicating with your customers.

The website updates are essential so your store can appear on the first page of Google, Bing, etc. searches. Google wants to see a fresh, interesting website, so you should execute these tasks slowly, either weekly or daily. But consistency is key.

We have not added any daily tasks of managing your business which is an essential part of being successful. Every business is different, but the tasks included in this planner is good for any business.

You should ask yourself - what can you do every day to maintain your momentum?

Once again, it's all about time and resources.

There are a lot of steps, but you will be guided through each one and we have made it as simple as possible for you to follow so you don't waste too much time thinking about what to do.

NOTE: We have added 31 daily pages to the planner for each month because this is an UNDATED planner.

The most important RULE OF THE GAME to make more SALES is:

- Listen to your customers and join the conversation they're already having.
- Create content that drives that conversation and captures their attention.
- Optimize your content so it is easily consumable on every platform your customers uses.
- Post content on all relevant channels and in all media formats
- Use paid ads to amplify your content to engage more customers and grow the conversion.

ANNUAL GOALS

Describe your vision for the year?

A mission statement is simply a short sentence or two that clearly defines what you do and why you do it. This is for you to get clarity why you are in business.

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What goals do you have for the next year!

ONLY 3 GOALS -> Be very specific about your goals.

Your 1st Goal is all about MONEY! How much do you want to make this year.

\$

Other goals = what do you hope to accomplish this year. The goals you set need to be precise, measurable, attainable, relevant, and timely.

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NOTE: It is important to know your product and how you will produce or purchase your inventory. You can't sell what you don't have. You need financial goals that are realistic, and they should match what your brand stands for and be attainable. Always keep in mind your time, resources, and budget.

" Logic will get you from A to B. Imagination will take you everywhere." - Albert Einstein

90-DAY GOAL

Steps to your 90-Day Goals

Take your annual money goals and divide them by 4.

Step 1: FINANCIAL GOAL

AVERAGE PRICE:

HOW MANY UNITS:

\$

\$

.....

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Step 2: THEMES For the Quarter

DATE:

What special holidays are coming up where you can promote your products? Monthly themes for eg. season, or special promotion, or launches etc. - 2 -3 at least.

Step 3: CUSTOMER

DATE:

Who is your customer that you want to target? Describe.

Step 4: PROMOTIONS

DATE:

What promotions and products are you going to concentrate on this quarter? Products, discounts, etc.

Minimum 1 per 4 to 6 weeks.

Your Tool Kit

These are your resources to create your content and distribute your content. Your website/store and your blog are a given. Now you have to decide how are you going to get your message to your customers.

Name of Tool	Annual/Monthly
<input type="checkbox"/> <i>Email Provider:</i> <i>Omnisend, Klaviyo, MailChimp, etc.</i>
<input type="checkbox"/> <i>Social Planner:</i> <i>HelloWoofy, Buffer, Smarterqueue, Sproutsocial, FACEBOOK Creator Tool, etc.</i>
<input type="checkbox"/> <i>Image Creation:</i> <i>Canva, Easil etc.</i>
<input type="checkbox"/> <i>Video Creator:</i> <i>Animoto, Wave.video, etc.</i>
<input type="checkbox"/> <i>Content Creator:</i> <i>Copy.ai, Conversion.ai etc.</i>
<input type="checkbox"/> <i>Chat Broadcast:</i> <i>ManyChat, Monkey..</i>
<input type="checkbox"/> <i>SMS Broadcast:</i>
<input type="checkbox"/> <i>Publication:</i> <i>For your articles: Medium, .PRWire, PRNews, etc.</i>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/> <i>SEO Research:</i> <i>Neilpatel.com, SEMrush.com, moz.com, etc.</i>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/> <i>Blog Research:</i> <i>Answerthepublic.com, hubspot.com, etc.</i>
<input type="checkbox"/>
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MONTHLY BUDGET

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
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Note: This is all about time, money, and resource management. And, really, in the end, we are in business to make money, so it is all about our profits.

IDEA: In an online business we always have those platforms, apps, and software we are trialing and forget to cancel. Here is a great way to keep track of where you are spending your money.

You should add your marketing and advertising budget so you can see the results against the spend.

How much do you need to spend to handle the increase of sales - pre-ordering your packaging, materials, product inventory, marketing materials etc.

INCOME 1	INCOME 2	OTHER INCOME	TOTAL INCOME

FIXED EXPENSES	BUDGETED	ACTUAL	VARIABLE EXPENSES	BUDGETED	ACTUAL
TOTALS			TOTALS		

MONTHLY CALENDAR

MONTH:

Monthly scheduling - check the tips in the back of the calendar for ideas.

TIP: This monthly overview is to give a quick idea of what you want to do and where it all fits. Once that is done, create your detail calendar online so you can keep track.











































NOTES:

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sun	mon	tue	wed	thu	fri	sat
						
						
						
						
						
						

NOTES & IDEAS

KEY IDEAS

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NOTES

TO DO LIST

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"There is only one success - to be able to spend your life in your own way." - Christopher Marley

MONTHLY SPRINT (SYSTEM PREP)

MONTHLY TASKS:

- Decide About Monthly Themes & Promotions
- Decide Your Marketing & Sales Channels
- Create Your Monthly Budget
- Schedule Daily Business Posts
- Announce & Promote Launch Event

TIP: Decide on a batch creating day. One day a month you create your next monthly posts and ideas.

Step 1: THEME & PROMOTION

Monthly Theme:

Monthly Promotion:

Step 2: TASK CHECKLIST - Monthly

- Review content performance from social platforms & emails.
- Research social trends, customer interests, competitor content, and comments for content inspiration.
- Create graphics, memes, captions, etc. for upcoming social posts.
- Email brand ambassadors and make a timeline for new content.
- Curate share-worthy articles and posts from influencers your customers follow.
- Write at least 4 new content ideas for your blogs which start with your monthly theme.

ACTION STEPS: WHEN:

Step 3: MARKETING & SALES CHANNELS

MARKETING CHANNELS

- Blog
- Email
- Facebook Chatty Posts
- Fb Personal Profile Posts
- Fb Live
- Fb Group
- Fb Page
- Fb Stories
- Fb Ads
- Instagram Chatty Posts
- IG Stories
- IGTV/REELS

- YouTube
- LinkedIn
- Pinterest
- Google My Business
- Twitter
- TikTok
- Podcast
- Amazon Live
- Skills
-
-
-

SALES CHANNELS

- Website/store
- Facebook
- Instagram
- Google
- Amazon
- Ebay
- Walmart
- Etsy
-
-
-

Step 4: CONTENT CREATION - Monthly Batching & Scheduling

Create weekly or bi-weekly blogs, email newsletters, graphics & daily posts. Ideas start with your blog..

BLOG ASSETS

1: Title tag (50/60 characters)

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2: Title tag (50/60 characters)

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3: Title tag (50/60 characters)

.....

4: Title tag (50/60 characters)

.....

ACTION STEPS:

WHEN:

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EMAIL ASSETS

(copy with two subject lines)

1: Subject Line:

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1: Pre-Header:

.....

2: Subject Line:

.....

2: Pre-Header:

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3: Subject Line:

.....

3: Pre-Header:

.....

4: Subject Line:

.....

4: Pre-Header:

.....

ACTION STEPS:

WHEN:

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STEP 5: VISUAL ASSETS

GRAPHIC ASSET CHECKLIST

- Website Banner
- Blog images
- Email images
- Facebook Biz Cover
- Twitter Cover
- LinkedIn Cover
- Pinterest Cover
- YouTube Cover
- Social Posts

VIDEO ASSET CHECKLIST

- Video Thumbnails
- Full video for YouTube
- 15 second clips for Instagram Stories
- 60 second clips for Instagram post
- 3min, 5min, 7min+ clips for all social

NOTE: You can easily get twenty different pieces of content from one single blog! Depending on how many social channels you have. And you can RE-USE all your assets.

TIP: CANVA.COM for graphic creation & sizes.

DATE:

M T W T F S S

DAILY TASKS:

- Review Performance
- Set Your Big Tasks
- Follow Up & Engage With People
- Share Your Memories
- Share a Personal Moment or Story
- Update & Refresh Your Website

RETENTION:

- Check in to celebrate success
- Check in to get referrals
- Email Nurture Sequence
- Connect with customer
- Affiliate/Partner Program nurture
- Send handwritten mail - ie thank you note.

"Tough times never last, but tough people do." - Robert H. Schuller

Today's 1 - 3 Big Tasks

1:00

2:00

3:00

4:00

5:00

6:00

7:00

8:00

9:00

ACTIONS:

10:00

11:00

12:00

13:00

14:00

15:00

16:00

17:00

18:00

19:00

20:00

21:00

22:00

23:00

24:00

Ideas/Notes	Done
Review Social:	<input type="checkbox"/>
Engage/Comment	<input type="checkbox"/>
FB Memories	<input type="checkbox"/>
Share Personal	<input type="checkbox"/>
Website Updates:	<input type="checkbox"/>
Blog Article	<input type="checkbox"/>
About Page	<input type="checkbox"/>
Product Page	<input type="checkbox"/>
Collections Page	<input type="checkbox"/>
FAQ	<input type="checkbox"/>
Image Optimizing	<input type="checkbox"/>
Image Alt Tags	<input type="checkbox"/>
SEO Preview	<input type="checkbox"/>
Other pages	<input type="checkbox"/>
Customer Service:	<input type="checkbox"/>
Answer Emails	<input type="checkbox"/>
Check Messages	<input type="checkbox"/>
Ask For Reviews	<input type="checkbox"/>
Connect - Customers	<input type="checkbox"/>
Ambassadors/Affiliates	<input type="checkbox"/>

NOTES

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