

New Business Operation planner

COMPANY NAME AND
DESCRIPTION

BUDGET

START DATE -

DUE DATE -

DURATION -

COMPLETED -

Clearly define the goals and objectives of the business operations

GOAL 1

GOAL 2

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PROJECT SCOPE AND DELIVERABLES

IDEAS

Business Overview

Date:

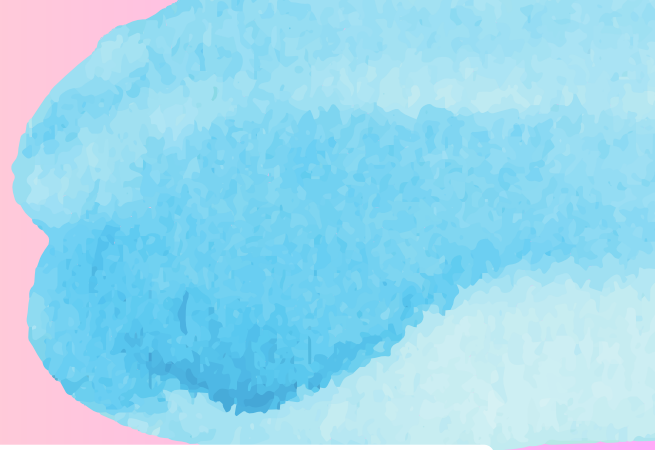
S M T W T F S

Planning

Marketing

Branding

Strategies



PROJECT DETAILS

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STAKEHOLDER ANALYSIS

Identify and analyze the key stakeholders involved in the business operations. Understand their roles, interests, and expectations to effectively manage relationships and communication.

RESOURCE PLANNING

Determine the necessary resources required for successful business operations. This includes personnel, equipment, technology, and facilities. Allocate resources effectively to ensure smooth operations.

IMPORTANT NOTES

PROJECT TIMELINE

DEVELOP A DETAILED TIMELINE WITH SPECIFIC MILESTONES AND DEADLINES FOR DIFFERENT PHASES OR ACTIVITIES OF THE BUSINESS OPERATIONS. THIS HELPS IN TRACKING PROGRESS AND STAYING ON SCHEDULE.

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WEEK 1

WEEK 2

WEEK 3

WEEK 4

WEEK 5

PROJECT DETAILS

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RISK ASSESSMENT AND MITIGATION

Identify potential risks and uncertainties associated with the business operations. Develop strategies to mitigate or manage these risks to minimize their impact on the project.

COMMUNICATION PLAN

Create a communication plan to facilitate effective information sharing among team members, stakeholders, and other relevant parties. Define the channels, frequency, and methods of communication.

IMPORTANT NOTES

PROJECT DETAILS

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QUALITY ASSURANCE:

Define quality standards and establish processes to ensure that the deliverables and outcomes of the business operations meet the desired level of quality. Implement quality control measures and continuous improvement practices

MONITORING AND CONTROL

Establish mechanisms for monitoring and controlling the progress of the business operations. This includes regular status updates, performance tracking, and addressing any deviations from the plan.

IMPORTANT NOTES

PROJECT CLOSURE

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DOCUMENTATION AND REPORTING

Implement a documentation and reporting system to capture important information, decisions, and progress related to the business operations. Maintain accurate records for future reference and evaluation.

CHANGE MANAGEMENT

Develop strategies and processes to manage changes that may arise during the business operations. This includes assessing the impact of changes, communicating changes to relevant stakeholders, and implementing change control procedures.

LESSON LEARNED

PROJECT CLOSURE

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Lesson Learnt

After the completion of the business operations, conduct a lessons-learned session to reflect on the project's successes and challenges. Document key insights and recommendations for future improvement.

Notes

DATE

/ /

MEETING AGENDA

What are your top three Agenda for this week?

1

2

3

TO-*do* LIST

Insert everyone Tasks for the week

SAVE *for* TOMORROW

Everything can't get started, add a few reminder notes & when it can get going

Action Item Tracker

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DATE

ACTION ITEMS	DEADLINES	ASSIGNEE	STATUS
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NOTES	

Resource Allocation

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DATE

TEAM
MEMBERS

EQUIPMENT

DATE
GIVEN

TEAM MEMBERS	EQUIPMENT	DATE GIVEN

NOTES	

MONTHLY BUDGET

MONTH OF

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INCOME			
DATE	SOURCE	CATEGORY	AMOUNT

BILLS & FIXED EXPENSES		
DATE	SOURCE	AMOUNT

VARIABLE EXPENSES		
DATE	SOURCE	AMOUNT

SUMMARY	
SOURCE	AMOUNT
INCOME	
BILLS & FIXED EXPENSES	
VARIABLE EXPENSES	
BALANCE	

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SWOT Analysis

STRENGTHS

-
-
-

WEAKNESSES

-
-
-

OPPORTUNITIES

-
-
-

THREATS

-
-
-

Competitor Analysis

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1. IDENTIFY COMPETITOR

Competitor			
Product/Service			
USP			

2. COMPETITOR STRATEGIES

What Are Some Key Strategies My Competitors Use?

How Can I Differentiate Myself? What Can I Do Better?

Target Market

Market Name :

Demographics

Desired Project Types

- ① _____
- ② _____
- ③ _____
- ④ _____
- ⑤ _____
- ⑥ _____

Typical Client Budget : _____

Client Needs & Motivation : _____

Industry/Niche : _____

Your Unique Selling Proposition (USP) : _____

Your Target Market : _____

PRODUCT /SERVICE FEATURE

Analysis

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WHAT ARE YOUR COMPETITOR'S CORE PRODUCT FEATURES?

WHAT PRODUCT FEATURES ARE UNIQUE TO YOUR
COMPETITORS?

HOW DO YOUR PRODUCT FEATURES COMPARE TO
THE SAME FEATURES OF YOUR COMPETITOR?

DOES YOUR COMPETITOR SUPPORT MULTIPLE
ENVIRONMENTS?

social Media calendar

Core Topic Post

Frequency

- Daily
- Weekly
- Monthly

Engagement Post

Frequency

- Daily
- Weekly
- Monthly

Specific Post

Frequency

- Daily
- Weekly
- Monthly

Social Media Audit

Current
Platform Used

Results from The Current Platform

Likes:

Comments:

Shares:

Views:

New Platform to Try:

Changes To Make:

Engagement Analysis:

Marketing Checklist

- SEGMENT YOUR LISTS



- SEND TARGETED COMMUNICATIONS



- COMMUNICATE WITH YOUR SALES TEAM



- DETERMINE YOUR "DIFFERENTIATOR"



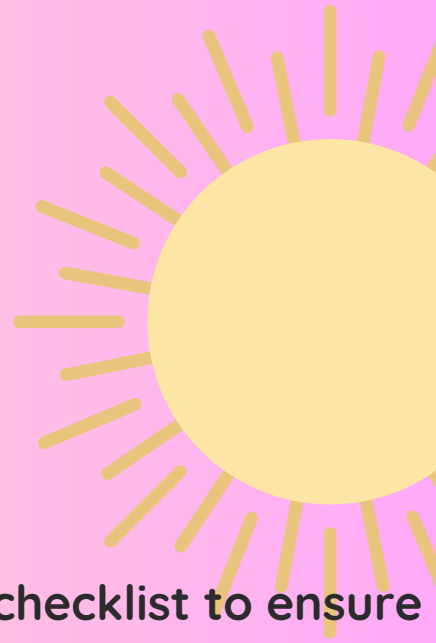
- GET SOME SWAG



- CREATE A FOLLOW UP FUNNEL OR FLOW



QUALITY ASSURANCE CHECKLIST



A page to establish quality standards and a checklist to ensure deliverables meet the desired level of quality.

Does your products or services meet the defined quality standards set by your business?

Do all business processes and operations are being followed according to established protocols? This includes adhering to standard operating procedures, maintaining consistency in workflows, and employees training

Are the customers happy? You can collect customer feedback through surveys and questionnaires.

Are all documentations available and clear? Have you checked for any mistakes in numbering or if all the numbers match?

Implement a system to monitor and track continuous improvement initiatives within your business. This can involve identifying areas for improvement, setting goals, implementing changes, and measuring the effectiveness of those changes over time.

Note to Self:

MILESTONE TRACKER

A visual representation of project milestones, allowing you to track progress and celebrate achievements



New Business Checklist

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- Define your business idea and objectives
- Conduct market research to identify your target audience and competition.
- Develop a comprehensive business plan outlining your products/services
- Determine your business structure (e.g., sole proprietorship, partnership, LLC)
- Secure any necessary licenses, permits, or certifications required for your industry.
- Set up a business bank account and establish a record-keeping system for financial transactions.
- Secure funding for your business through personal savings, loans, investments, or grants.
- Create a strong brand identity, including a business name, logo, and website.
- Develop a marketing strategy to promote your products/services and attract customers.
- Set up your physical location or create an online presence, depending on the nature of your business.
- Acquire necessary equipment, inventory, or supplies for your business operations.
- Hire and train employees, if applicable, and establish clear roles and responsibilities
- Set up an accounting system to track income, expenses, and taxes.
- Get all the needed tools: Task management, CRM, Ecommerce, Campaign, Social media Scheduling
- Obtain business insurance to protect against potential risks and liabilities.
- Establish pricing strategies that align with your target market and business goals.
- Create a sales and marketing plan to attract and retain customers.
- Stay compliant with all legal and regulatory requirements related to your industry

Remember to adapt this checklist based on your specific business needs and industry requirements. Starting a new business can be complex, so it's important to research and seek professional advice when necessary. Good luck with your new venture!