

1.Visionary Details	7
eCommerce Store	7
Vehicle Usage Policy	9
Unearth Market Trends	9
Time Management (Personal)	10
Time Management (Business)	10
Test Groupd	11
Terms and Conditions	11
Telephone Etiquette Policy	12
Subscriber Sign Up Box	12
Add to Directory	12
New Supplier *	12
Stock Requisition	13
Start Up Costs Calculator	13
Social Media Policy	13
Social Media Platform Manager	13
Social Media Audit	14
Shareholder Information	14
Public Display Contact Information	14
Set a Meeting Agenda	15
Services Manager	15
Service Blueprint	16
Self Awareness Check In	19
Self-Profile Indicator	23
Sales Forecaster	24
Registered Business Information	24
Re-invent Yourself	25
Projects Manager	25

Profit and Loss Statement	25
Profit Formula Calculator	26
Product Sales and Distribution Manager	26
Product Blueprint	27
Podcast Planner	30
Personal Goal Setting	31
Personal Finances Audit	31
Personal Budget Calculator	31
Perfect Offer Map	31
Passion Finder	32
Partnerships and Alliances	32
Paid Ad Campaign Planner	33
Paid Ad Campaign	34
New Distribution Network	34
Overdue Calculator	35
Onboarding	35
Acceptable Payment Methods *	36
Official Business Information	36
New Starter Email Account Credentials	37
New Refund or Credit Note	37
New Customer Journey	37
About Your Business *	37
Project Summary *	38
About your Brand *	38
Products Manager *	39
Services Manager *	39
List your top 5 lead generation channels *	39
Monthly Operating Budget	39

Operating Costs	39
Monthly Budget Calculator	39
Money Log	40
Marketing Campaign Planner	40
Affiliate Marketing Partnerships	41
Membership 2	41
Membership 1	41
Assets and Liabilities Tracker	41
Marketing Campaign Manager	42
Paid Marketing Campaign Planner *	42
Content Marketing *	42
Market Viability Analysis	42
Market Analysis Report	43
Local Funnel Builder	43
Lead Generation Website Planner	43
Users Role Access Requirements *	44
Summary	44
Lead Generation Channels	44
Lead Generation Channels	44
Launch Email Framework	45
Keywords Manager	45
Key Business Identifiers	45
Incoming Leads Tracker	46
Hosting Server Details	47
Gross Margin Calculator	47
Goals	47
Email, Internet and Communications Policy	47
Email Marketing	47

Email Campaign Audit	48
Editorial Calendar	48
Dress Code Policy Generator	48
Book a Trip	48
Category Manager	49
Changing Your Perception	49
Cash Flow Projection	50
Campaign Builder	50
Business Processes Manager	50
Business Growth Strategy	51
Brand Colors	51
Broad Audience Demographic	51
Blog Post Creator	52
Brand Development Manager (copy)	52
Customer Billing Information *	52
- Registered Business Information *	53
Domain Information *	53
- Domain Ownership Information *	53
- - Contact Information *	54
- - Administrative Contact *	54
- Domain Details	54
Hosting Information	55
- Hosting Package Details *	55
- - FTP Access *	55
- Control Panel Credentials *	55
Email Account Credentials	56
- Email Credentials *	56
Discovery Workshop *	56

- Business Concept *	56
- Business Information *	56
- - Industry Vertical *	57
- Website Development *	57
- - Webmaster Credentials *	57
- - Website Framework *	57
- - Website Goals	57
- - User Roles and Permissions *	57
- - - eCommerce Functions *	57
- - 3rd Party Scripts, Integrations and API's *	57
- Website Maintenance *	58
- eCommerce Platform *	58
- - Utility Pages	58
- - - Cart Page *	58
- - - Checkout Page *	58
- - Physical Address (Store or Depot)	58
- - Shipping and Delivery Options *	59
- - Acceptable Payment Methods *	59
- - Banking Details for Incoming Payments *	59
- - Payment Gateway Information *	59
- - Transactional Emails *	59
- - - Email Sending Options *	60
- - - Email Design Options *	60
- - eCommerce Features *	60
Brand Marketing *	60
- Brand Identity *	60
- - Color Palette *	61
- - Graphics, photos and visuals *	61

- - Typography *	62
- Brand Messaging *	62
- - Brand Story *	62
- - Brand Definition *	62
- - Tone, Voice and Personality *	62
- - Tagline *	62
- - Customer Value Proposition (CVP)	63
- - Brand Promise *	63
- - Unique Selling Proposition *	63
- - Unique Value Proposition *	63
- - Brand Positioning Statement *	63
- - Author Biography *	63
- - Elevator Pitch *	63
- - CVP *	63
- Distribution Channels *	64
- Public Display Information *	64
- Portfolio Items *	64
- Talking Points *	65
- - Editorial Calendar *	65
- - Blog Article Categories	65
- Brand Assets *	65
- Focus Keywords *	65
- Professional Accreditations *	65
Brand Definition	65
Brand Story	66

1.Visionary Details	
group_5fd2166a96e91	
Label	
Visionary Name	
Visionary Surname *	
Designation *	
City *	
Country *	
Language *	
Transacting Currency *	
Business Stage *	
Upload Your Profile Photo *	
eCommerce Store	
group_5fd27cab855fb	
Label	
How many products are you selling online? *	
What are your main product categories? *	
What are your main listing categories? *	
What are your main listing locations?	
What are your main lesson categories? *	
Abandoned Cart Transactional Email *	
New User or Customer Welcome Email *	
Password Reset Email *	
New Order Email *	
Failed Order Email *	
Order on Hold Email *	
Order Processing Email *	
Completed Order Email	
Refunded Order Email *	
Will you include coupons for your customers? If so, list them here *	
Bestselling Products *	
Featured Products *	
Highest Earning Products *	

Products "On Sale" *	
Stock on Sale / Stock to Move *	
Will you enable tax rate calculations? If so, at what tax rate? *	
Will you allow reviews on your website? *	
Will reviews be limited to verified owners only? *	
Do you want to enable the star rating on customer reviews? *	
Do you want to enable stock management? *	
Do you want to enable low stock notifications? *	
Do you want to enable out of stock notifications? *	
Do you want to hold stock (for up to 60 min) for unpaid orders? *	
Do you want to display "In Stock" Under product *	
Do you want to hide "Out of Stock" Products? *	
What Variations and Attributes will you add? *	
Enable Shipping Calculator on the basket page *	
Do you want to hide shipping costs until an address is entered? *	
Do you want to manage backorders? *	
Will you manage stock updates yourself? *	
What contact information will be displayed on your online store? *	
What is the physical address of your main distribution point or head office? *	
Upload Your Risk Reversal Banner *	
Checkout Fields *	
What secure payment methods do you offer? *	
What terms and conditions will you link to on checkout? *	
What is the primary call to action?	
What trust icons will you include? *	
What social proof and reviews will you include on your store? *	
What benefits will you list on checkout? *	
Default delivery address to: *	
On what date will you launch your ecommerce platform? *	
What currency will you transact in? *	
What type of eCommerce Platform are you building? *	
What Manufacturing Warranty do you offer on your products? *	
Which of these plugins will you use on your eCommerce Platform? *	

Attach a copy of your master pricelist (CSV) *	
What metrics do you use for weight? *	
Dimensions Unit *	
What type of eCommerce platform are you creating? *	
Specific Wording on the Cart Page *	
Specific Wording on the Checkout Page *	
User Account Page Text *	
Text for orders tracking page *	
Text for Wishlist Page *	
Text for Product Compare Page *	
Vehicle Usage Policy	
group_5fff1d89c5f7a	
Unearth Market Trends	
group_5fd4d5a9189f8	
Label	
Which social platforms dominate your niche *	
Have you positioned yourself as the "go-to" provider within your niche *	
How competitive is your niche online *	
Is there an explicit need for your offering? *	
What is the search volume for your offerings? *	
Is the marketplace growing? *	
Is there the potential for recurring income within your niche? *	
Who would you help for free? *	
How much passion will you have for this industry in 10 years *	
What is the purpose of you business? *	
How do you solve this problem? *	
Describe the main problem that your business solves *	
In which main locations do you solve this problem? *	
How big is this problem in your locations of service? *	
Is the problem that your business solves seasonal? Describe details here *	
When is your busiest period annually? *	
How much of the marketplace and marketshare do you intend to take?	
Go into detail about how you solve this problem *	

What typical frustrations do customers experience within your industry. *	
How will you improve these frustrations for customers? *	
Time Management (Personal)	
group_5fd2f6141b89f	
Label	
How much time do you spend on business tasks that are urgent and important? *	
How much time do you spend on tasks that are urgent, but not important? *	
How much time do you spend on tasks that are important but not urgent?	
How much time do you spend on urgent and important tasks? *	
How much time do you spend on tasks that are not urgent and not important? *	
What is your time worth to you in monetary value (Per Hour) *	
How much time do you spend bonding with your kids? *	
How much time do you spend checking in on extended family? *	
How much time do you spend connecting with and getting to know your partner? *	
How much time do you spend improving important relationships and intimate connections? *	
List activities that are not really important to you, but cause a sense of urgency in your life and thereby make you feel compelled to spend time on them? *	
Estimate how much time is spent on these activities that would be better used elsewhere. *	
How much time do you spend meeting the demands of others? *	
How much time do you spend on habitual distractions? *	
Describe the areas of your life in which you spend wasting time. *	
List all of the things you have no control or influence over, but waste time and energy on anyway *	
List all of the ways you would spend your time if you had no other obligations or demands *	
List why you know it is silly to be spending your time on the things that dont matter *	
Now, make a list of time management goals aimed to help you spend more time doing what you love and matters, and less time on meaningless things *	
Time Management (Business)	

group_5fd2f3d18218b	
Label	
How much time do you spend coming up with new and creative ideas? *	
How much time do you spend actively generating new leads for your business? *	
How much time do you spend analyzing and reviewing business processes?	
How time do you spend brainstorming, planning and strategizing new business ideas? *	
How much time do you spend finding new suppliers and building relationships with new ones? *	
How much time to do spend forging real connections with members of your team? *	
How much time do you spend researching new technologies and innovations in your industry or niche? *	
How much time do you spend on business tasks that are urgent and important? *	
How much time do you spend on tasks that are urgent, but not important? *	
How much time do you spend on tasks that are important but not urgent?	
How much time do you spend on urgent and important tasks? *	
How much time do you spend on tasks that are not urgent and not important? *	
What is your time worth to you in monetary value (Per Hour) *	
Test Groupd	
group_60bdf1c8e2325	
Label	
Test Group !A	
Label 1	
Terms and Conditions	
group_5fd363862c37c	
Label	
End User Agreement *	
Warranty Terms *	
Returns and Refunds Policy *	
GDPR Compliance *	
Terms of Sale *	

Cancellation Policy *	
Payments Policy *	
Shipping and Delivery Policy *	
Disclaimer of Liability *	
Copyright Policy *	
General Terms and Conditions *	
Online Security Statement	
Telephone Etiquette Policy	
group_5fff2c1b04ce9	
Subscriber Sign Up Box	
group_5fff10c6a1bdd	
Label	
Subscriber List Name Allocation	
Questions	
What sign up confirmation will be sent with the confirmation HTML responder	
What does your acceptance checkbox say?	
Add to Directory	
group_601404f5bbb95	
Label	
New Supplier *	
- Supplier Name	
- Supplier Tel	
- Orders Email Address	
- Accounts Email Address	
- Sales Rep	
- Sales Rep Mobile	
- Banking Details	
- Account Ref Number	
- Payment Terms	
- Discount %	
- Types of Products Supplied	

- Average lead times to receive products from this supplier	
- Orders and logistics process for this supplier	
- Physical Address for Collections	
- Repairs and Refunds Policy and Process	
- Guarantees and Warranties Process	
- Warranty Document	
- Related Documents	
- - Document Name	
- - Upload File	
- General Notes	
Stock Requisition	
group_5ffee897b0d31	
Label	
Product Name	
Size	
Product Type	
Quantity	
Requested By	
(no label)	
Start Up Costs Calculator	
group_5ffee72db0ac0	
Social Media Policy	
group_5fff1d749e102	
Social Media Platform Manager	
group_5fd2799989f62	
Label	
Platform *	
Platform Link *	
Username *	
Password *	
Email Address	
Unique API *	
Which of these do you still need to do? *	

What is your PR or Automated Reponse Strategy for this platform? *	
How often will you post on this platform? *	
What are the main topics you will discuss on this platform? *	
What type of content will you share on this platform *	
When are the best days to post on this platform for your industry? *	
What are the best times to post on this platform for your industry? *	
What buyer groups or personas will you focus on when marketing on this platform? *	
What is your monthly marketing budget for this platform? *	
Social Media Audit	
group_5fd34d8102b00	
Label	
Which Platform are you auditing? *	
How many followers does this platform currently have? *	
Audit Date *	
How many leads did you generate from this platform this month? *	
Shareholder Information	
group_5fdc6a6129c82	
Label	
Shareholder First name *	
Shareholder Last Name *	
Date of Birth *	
Certified ID Copy *	
Signed Shareholder Agreement *	
Certified Proof of Address *	
Certified Proof of Banking Details *	
Individual Tax Clearance Certificate *	
Shares %	
Public Display Contact Information	
group_5fd35130b5251	
Label	
Brand Name *	
Head Office Contact Number *	

Enquiries Email Address *	
Accounts Contact Number *	
Dispatch Contact Number *	
Support Contact Number *	
Support Email Address *	
Dispatch Email Address *	
Head Office Physical Address *	
Website *	
Social Media Platforms *	
Main Depot or Distribution Center *	
Sales Team Email Address	
Sales Contact Number *	
Set a Meeting Agenda	
group_5fd22da4af326	
Label	
What is the clearly defined agenda for this meeting? *	
What would you like your team to prepare before this meeting? *	
What are your expectations? *	
Describe the current events, projects, tasks or products you will discuss *	
What actionable tasks will you delegate and who will you delegate them to? *	
Will you discuss ways to decreases costs and expenditure? *	
Will you discuss any new processes and procedures? *	
What business issues, blocks and challenges will you discuss? *	
After the meeting will you: *	
Services Manager	
group_5fd37c935001f	
Label	
What types of services do you offer? *	
How many services do you offer? *	
Do you provide your services in person or online? *	
How do you provide your services? (Walks-ins welcome, Virtually, By Appointment Only, At the Customers Premises) *	
What is your average lead time to provide your services to customers? *	
List all of the main service categories that you provide *	

List all of the services you provide here *	
In which specific locations do you provide your services? *	
In which specific locations do you not provide your services? *	
Do you have a rates card with a list of all your services for customers? *	
Which of your services generates the most turnover? *	
Which of your services generates the most profit? *	
Which of your services takes the least amount of time to deliver? *	
Which of your services requires the least amount of workforce and materials? *	
Which is your most booked service? *	
Excluding your most booked service, which other services that you offer are very popular (featured), list them here: *	
Do you offer a workmanship warranty on your services? *	
Which of your services require the shortest lead times? *	
What do customers typically complain about either within your industry or your business related to service delivery *	
How will improve these common frustrations for customers? *	
Who will manage customer complaints? *	
How quickly will you respond to new leads?	
Which email address will new leads be sent to? *	
Who will be responsible for receiving incoming leads? *	
Who will be responsible for managing and nurturing new leads? *	
Who will be responsible for receiving telephone leads? *	
Who will be responsible for calling the new customer back once a new online enquiry is received? *	
Who will manage services pricing and updates? *	
Who will generate new leads reports? *	
Who will follow up for feedback once the project is completed or the service is delivered? *	
Will you give customers a small branded gift in thanks of their support when booking your service? *	
Service Blueprint	
group_5fd37f2d5e15c	
Label	
Service Title *	

Main Service Category *	
Sub Category	
Are there multiple options available for this service? *	
How much lead time do you need from customers who want to book this service? *	
What problem does this service solve? *	
What pain points and frustrations will compel customers to book this service? *	
How will this service transform these frustrations for your customers? *	
What are the main features of this service? *	
What benefits will customers enjoy once you have finished providing this service? *	
What are the main highlights of this service? *	
What type of service is this? (Most booked, highest earning, featured) *	
What are the main advantages customers will enjoy once you have delivered this service? *	
Do you offer a workmanship warranty for this service? *	
What are your workmanship warranty terms and validity period? *	
Do you have a maintenance plan option for this service? *	
Describe the maintenance plan options and what is included *	
When will you follow up with this customer for an upgrade, replacement or renewal? *	
What will they be upgrading, renewing, or replacing? *	
Do you charge a fixed or hourly rate to deliver this service? *	
What is your rate to deliver this service? *	
List all of the materials required to deliver this service? *	
List all of the tools needed to deliver this service? *	
What qualifying questions will you ask these customers before you can provide a solution? *	
What do customers appreciate most about this service? *	
List at least 4 frequently asked questions and their answers in relation to this service *	
What marketing materials do you have available for this service? (Brochure, pricelist, product cards, advertising copy) *	
What would customers most likely be searching for *	

What service related keywords, search terms and phrases is this customer most likely to search for on Search Engines? *	
Who is the best person to receive leads for this service? *	
List common conversational topics around this service *	
What steps will customers take to book this service? From the moment they first discover your brand online, right down to the 5 star testimonial they send you as feedback *	
Will you send a responder email to customers who submit the lead form with the details of your bookings / project management process? *	
What job roles do you require to fulfill this service? *	
How long in total will it take you to provide this service? *	
What is the total amount it will cost you to purchase the materials for this service? *	
What will you charge per km travel to deliver this service? *	
What will it cost you to book the workforce required to deliver this project? *	
Will you charge a cancellation fee for this service? If so, what is the cancellation notice period and how much is the cancellation fee if they cancel after the specified notice period? *	
Will you split customers payment into a deposit payment to confirm the booking and then into one or two more payments as the project progresses? Describe the process here: *	
Describe Your Payment Terms for this service here *	
Will you add a contingency percentage of 5% as prescribed to cover any project complications due to unforeseen circumstances or delays? *	
What is your cancellation policy if a customer makes a booking and payment and then cancels at the last minute? *	
How many times can you deliver this service in a day? *	
How many times can you deliver this service in a month? *	
How many bookings do you intend to receive each month? *	
How many times can you deliver this service each week? *	
Which of your buyer groups or personas are most likely to book your service? *	
Who are your main suppliers and service providers to provide this service? *	
List the entire service delivery process. From the moment customers find out about your brand to project sign off *	
List all the steps required to provide this service from start to finish *	

Who are your main suppliers and service providers needed to provide this service? *	
Who will follow up for feedback once the project is completed or the service is delivered? *	
How will you measure which advertising or marketing campaign is driving new leads to book this service *	
In which new locations would you like to extend this service offering to? *	
Self Awareness Check In	
group_5fd368f7dd486	
Label	
I am thoughtful and considerate of other peoples feelings *	
I am in complete control of all areas of my life *	
I am open minded and approachable	
I love to give compliments and make others feel good *	
I am thoughtful considerate of other peoples feelings *	
I am in complete control of all areas of my life *	
I am open minded and approachable *	
Everyday feels like a chore. I really do not enjoy what I do *	
Financial Freedom is important to me *	
I accept responsibility for the poor choices and mistakes I have made *	
I always act on my ideas *	
I always do the right thing. Even when no-one is watching *	
I always give credit when credit is due *	
I always plan in advance and make sure I am prepared for the day ahead *	
I always reverse engineer my shortcomings to discover how to plug the holes *	
I am a practical and decisive person *	
I have chosen to learn from my past instead of carrying regrets, resentment and pain *	
I am a practical and decisive person *	
I am always in a positive competitive state. I only compete against myself *	
I am always looking for solutions to the problems I encounter *	
I am an approachable person *	
I am clear about my personal boundaries *	
I am committed to expanding on the the vision I have for my life *	

I am committed to expanding the vision I have for my business *	
I am considered an expert and respected as a professional within my industry *	
I am held captive by my fears and past experiences which no longer exist *	
I believe life is here to be lived with passion, vigour and renewal *	
I understand that everything is a reflection of my state of mind. *	
I am held captive by my fears and past experiences *	
I am honest and transparent about my feelings *	
I choose not to hurt and put people down. I choose to live and let live. *	
I choose not to put people down or be condescending just achieve a personal desire *	
Before I judge other peoples reactions and behaviours I always listen to and try to understand their point of view *	
I understand that everyone is fighting their own battle and everyone is entitled to compassion *	
I am living a life of purpose *	
I am living the life I have always dreamed of *	
I believe strongly in my ideas. They have great potential and offer excellent opportunities *	
Wealthy people are selfish and evil *	
I am not skilled enough to start my own business *	
I am passionate and intentional in everything that I do *	
I am powerless to positively contribute to other peoples lives *	
I am pre-emptive and try to predict and circumvent / avoid problems *	
I am quick to offer compliments *	
I am quick to point out other peoples flaws *	
I have a lot of insecurities *	
I am responsible for the outcomes of my life *	
I attach my self-worth to outcomes and my perception of success *	
I believe that it is more important for a leader to appear right, than to actually be right *	
I cannot afford to pay my bills on time. I pay what I can, when I can. *	
It's important to crush and destroy people who you perceived have hurt you *	
I would never lead someone down the garden path to intentionally cause them pain *	

I would never intentionally try to hurt or damage another persons reputation *	
I would never intentionally damage someone elses confidence *	
I cannot afford to pay my bills on time. I pay what I can, when I can. *	
I compete with others to beat them and show them who is boss. *	
I deal with problems as they arise *	
I do not feel worthy or valuable *	
I do not have the time or capacity to take the action needed to change the things I am unhappy about in my life *	
I do what I do each day just to survive *	
Everyone is out to get me, so I just get the better of them first before they get me *	
It's important to punish people for extended periods of time for perceived wrong doings *	
I can treat people the way I want. Their emotions are not my problem *	
The only way to get respect is to have a lot of money *	
It doesn't matter how you get money. As long as you get as much as you can *	
Integrity and character are less important than money and status *	
I don't trust anyone. Everyone is out to get me or has a motive *	
I feel a heavy weight of guilt and shame on my shoulders *	
I feel an overall sense of safety and security in my life *	
I feel like I matter and I am important *	
I feel miserable and uncomfortable in my own skin *	
I feel pride and accept accountability for the great things I do and the impactful decisions I make *	
I have a great amount of passion for the industry I work in *	
I have a strong, personal code of ethics that I follow *	
I know enough about what I do to get by *	
I let the people in my life and business know that they are valued and appreciated *	
I love and respect myself and honor my mistakes, lessons and achievements *	
I love helping people *	
I need to sacrifice my own well-being for other people *	
I often do thing to get praise, validation or recognition *	

I only feel good when people are acknowledging me and paying attention to what I am doing *	
I praise myself when I do something well and am always striving to do better *	
I praise myself when I do something well and am always striving to do better *	
I put people down to elevate my own perception of myself, even if I am wrong and regardless of the pain I cause *	
I show interest in the people I care about, I listen to their feelings and am a strong, supportive presence in their lives *	
I spend a lot of time defending and explaining myself *	
I spend a lot of time researching my creative ideas and educating myself *	
I spend a lot of time trying to please people *	
I spend a lot of time trying to prove a point to other people *	
I struggle to take criticism and get offended easily *	
I take great pride in my work and everything else that I do. I ensure that every task is completed to the best of my ability *	
I tend to be approachable and open to new ideas and feedback *	
I tend to be scattered and indecisive *	
I tend to be stubborn and stuck in my ways *	
I tend to focus on my problems and get stuck in them *	
I understand that constructive criticism is the key to growth and expansion *	
I understand that everyone communicates differently *	
I understand that everything that has happened to me, despite how wonderful or how painful, has led me to this point of growth and understanding *	
I understand that through the collaboration of minds and creativity, great breakthroughs come about *	
I wait to see what the day has in store for me and deal with things as they come *	
I wake up inspired and excited each morning *	
I was born poor, therefore, I must die poor *	
It is a dog eat dog world. If I don't look out for myself, who will? *	
It is important that everyone knows I am the boss / leader *	
It is important to me that I am always right	
It is not important to me to grow this business for the long term. It is giving me what I need right now. I just need to make money *	

Life is life. Whatever	
Making Money is hard *	
My bills are always paid on time and I have a reputation of trust with people I transact with *	
My circumstances are not my fault. I am a victim in all of this. *	
My happiness and fulfillment is important to me *	
My happiness and fulfillment is up to everyone else around me *	
My health depends on my DNA / Genetics *	
My intention is to build a legacy *	
My life has no particular purpose *	
My peers, employees, friends and family respect me *	
Only wealthy people have time and financial freedom *	
Others are lucky to have me around and are responsible for my happiness and well-being *	
People have let me down in the past. This is why I cannot love / hope / trust / dream *	
Some people are just meant to work for other people *	
When something goes wrong it is usually someone else's fault *	
Making Money is hard *	
Who is the real me?	
Who is in control of my life?	
If I am not in control of my life, who is?	
My skills and talents include	
Self-Profile Indicator	
group_6026859b59d33	
Label	
I like to show my feelings	
I don't like to meet new people	
I find that I don't get close to many people	
I can usually approach my life in a positive way	
I am not always sure of my true feelings	
I am able to express my ideas easily	
I worry about other peoples opinion of me	
I am a good listener	

I usually put other peoples needs before my own	
I know how to trust my intuition	
I am self critical and often put myself down	
I am sometimes critical of others	
I enjoy making new friends	
I find it difficult to say no	
I feel confident when starting something new	
I enjoy my own company	
What two qualities do you most admire about yourself?	
If what ways do you think that these qualities and attributes help you to communicate your needs effectively?	
Do you have any personal qualities you would like to change? If so, what are they?	
How do you believe these qualities impact your ability to communicate clearly?	
Sales Forecaster	
group_5ffee848baa99	
Registered Business Information	
group_5fdbab6b4210c9	
Label	
Registered Company Information	
Registered Company Name *	
Company Registration Number *	
Date of Registration *	
Country of Registration *	
Type of Company *	
Years in Business *	
VAT Registration Number *	
BEE Level *	
BEE Registration Number *	
Company Continuity	
Upload Your Official CIPC Disclosure *	
Upload Your Proof of Banking Details	
Upload Your Proof of Business Address	

Upload Your Most Recent Annual Returns	
Upload Your Tax Registration Certificate	
Re-invent Yourself	
group_5fff0b564ba0d	
Label	
Who I am	
What I stand For	
What I love	
What I Despise and Will Not Stand for in my life	
What excites and drives me	
The results I am committed to achieving	
My Most Important Personal Values, Boundaries and Rules	
Personal Categories of Improvement	
Professional Categories of Improvement	
Projects Manager	
group_5fff04cedda35	
Label	
Project Name	
Project Start Date	
Project Phases	
Milestones	
Tasks	
Project Materials Checklist	
Project Requirements	
Project Action Plan	
Key Results / Outcomes	
Project Goals	
Allocated Team Members	
Related Communications and Tasks	
Project Timeline	
Customer Information	
Profit and Loss Statement	
group_5fd34ec13bb89	

Label	
Audit Start Date *	
Audit End Date *	
Total Income for this period *	
Total Expenses for this period *	
Total Costs for this period *	
Total Turnover for this period *	
Total Profit for this period *	
Profit Formula Calculator	
group_5ffee5575a7d8	
Product Sales and Distribution Manager	
group_5fd235045ec9e	
Label	
What types of products do you sell? *	
How many products do you offer?	
How do you source your products? *	
How do you get your products to your customers? *	
What is your delivery lead time on products? *	
What specific locations do you deliver your products to? *	
Which specific locations do you not deliver to? *	
How do you charge for product delivery?	
List all of your main product categories *	
What is your bestselling product? *	
List all of your highest earning products *	
Which of your products are currently on sale? *	
Apart from the bestseller specified above, list all of the other bestselling products in your product range *	
Which products do not typically sell well? *	
Who will be responsible for managing stock inventory updates? *	
Who will manage distribution and logistics? *	
Who will be responsible for sourcing new products? *	
Who will be responsible for adding new products to your product portfolio? *	
Who will process new incoming orders? *	
Who will receive, pick, pack and dispatch stock? *	

Who will manage pricing updates? *	
Who will generate product orders reports? *	
Who will book courier services and manage courier relationships? *	
Who will notify customers of the progress of their orders? *	
Which email address will new enquiries be sent to? *	
Who will manage customer complaints? *	
Who will be responsible for managing pricing and updates? *	
Who will keep your master pricelist up to date? *	
Which location that you sell your products in generates the most revenue? *	
Which location generates the least revenue?	
Which locations have great potential? *	
Do you have a retail catalogue or pricelist showcasing all of your products? *	
How will you measure online sales versus other sales channels? *	
Which of your products would you like to distribute more widely? *	
How do you intend to expand your existing distribution of these products? *	
In which locations would you like to expand product distribution to? *	
What new opportunities does this new distribution network represent? *	
What challenges or barriers does this new distribution network represent? *	
List the specific location you deliver to, how much you charge per location and the average lead time for that specific location: *	
Product Blueprint	
group_5fd26b72af0c2	
Label	
Product Name *	
Supplier Name *	
Cost ex VAT *	
Cost Inc VAT	
Contingency % *	
Markup %	
Recommended Retail Price *	
Our Retail Price	
Profit Value *	
Per Unit Sales Target *	

Supplier Code *	
Internal Code *	
Materials of Construction *	
Which of these best describes this product? *	
What are the specific delivery options available for this product? *	
What are the delivery rates for this product by location? *	
List the 3 most important features of this product *	
List all of the available options for this particular product *	
What problem does this product solve? *	
What frustrations and pain points will compel your customers to buy this product? *	
List how this product transforms these frustrations into positive experiences: *	
What benefits will customers enjoy once they have purchased this product? *	
What type of product is this? *	
How is this product packaged? *	
What is the weight of the packaged product? *	
What is the height of the packaged product? *	
What is the length of the packaged product? *	
Packaged Product Width *	
What is the diameter of the packaged product? *	
Do you offer any specific services in relation to this product? If so, list them here. *	
List a minimum of 4 product related Frequently Asked Questions from customers *	
Returns, repairs and refunds policy for this product *	
Manufacturer Lead Time for you to receive this product *	
How long does it normally take for you to receive or manufacture this product? *	
How long does it take for the customer to receive the product once they have successfully placed their order? *	
What customer testimonials do you have for this product? *	
What is the current market positioning of this product? *	
Which buyer group or persona is this product targeted at? *	
What is the unique selling proposition of this product? *	

What is the customer value proposition for this product? *	
What is the advertising description for this product? *	
What is the primary call to action for this product? *	
What is the detailed description of this product? *	
What lead magnet will you use to attract customers to this product? *	
What keywords, search terms and phrases is this customer most likely to search for on Search Engines? *	
List how leads generated for this product will be funneled? *	
Lists the steps or process customers will follow when purchasing this product. From the moment they first discover your brand online, right down to the 5 star testimonial they send you as feedback *	
Who is the best person to receive and nurture leads for this product? *	
What does this product increase for your customers? *	
By how much will this value increase or improve? *	
How long will it take to see the improvement or increase? *	
What frustrations does this product decrease for your customer? *	
By how much will this decrease? *	
How long will it take for customers to enjoy the decreased frustration *	
How long will it take for customers to enjoy the decreased frustration or notice results? *	
What is the competitive positioning of this product? *	
What existing marketing materials do you have available for this product? *	
How will you create awareness for this product?	
Are there any qualifying questions you need to ask your customers before you recommend this product *	
Which of the following do you have for this product? *	
Warranty Period *	
Specific Warranty Terms *	
List any other specific sales terms you have for this product: *	
Date Today	
Main Category	
Sub Category	
Product Brochure	
Product Card	
Product Image Gallery	

Product Diagram	
Manufacturer Warranty for this Product	
Product Care and Maintenance Instructions	
Usage Instruction Manual	
Related Blog Article	
Product Marketing Video	
Email Marketing Campaign	
Related Products	
Related Services	
Height	
Length	
Width	
Weight	
Packaging Type	
Packaging Shape	
Supplier Product Brochure	
Distribution Channels	
Customer Journey	
Featured Product Image	
Podcast Planner	
group_5fd23125a0815	
Label	
Podcast Title *	
Podcast Description *	
Cover Artwork *	
Focus Categories *	
ISO639 2 Letter Language Code *	
Is the content Explicit? *	
What problem are you solving for listeners in this podcast? *	
What actionable insights will you provide for listeners? *	
Where will you distribute your podcast audio? *	
How will you leverage your guests audience? *	
Who is your guest? *	

What are this guests credentials? *	
What does the guest wish to achieve from the podcast? *	
Personal Goal Setting	
group_6017f7b618faf	
Label	
5 Medium Term Goals	
5 goals for the upcoming year	
5 goals you wish to achieve over the next 6 months	
5 Goals you wish to achieve in the next 30 days	
5 actionable goals for this week	
Personal Finances Audit	
group_5fd2fae204527	
Label	
What are your income streams? *	
In total, how much money do you bring home each month? *	
How much do you earn off interest and dividends each month? *	
How much money do you have saved? *	
What are you wasting money on? *	
What would you like to spend more money on? *	
How do you plan the way you spend your money? *	
Are you happy with what you are gaining in return for your expenditure? *	
How much money will it cost for you to live the life of your dreams? *	
How much money do you need to live a comfortable life, that meets the standards and quality you desire? *	
How do you shop? *	
Personal Budget Calculator	
group_5fd2ff3e8c925	
Label	
Allocation *	
Amount *	
Payment Frequency *	
Perfect Offer Map	
group_60204ac888972	

Passion Finder	
group_5fd2fff75197a	
Label	
Write a list of your best skills. What do people often tell you that you are good at? *	
List your passions here. What makes you tick? What excites you? *	
What are your hobbies and interests? How do you currently spend time outside of work or your business? *	
What common challenges do you encounter in your personal daily routine? *	
What common problems do you tend to encounter in your professional / business / work life each day? *	
How many hours a week do you work on average growing somebody else's business? *	
How do you feel about this? *	
Which areas of your existing job or profession do you enjoy the most? *	
Which parts of your industry, business or profession do you least enjoy, or find least rewarding? *	
What parts of your industry, business or profession do you most enjoy and / or find the most rewarding? *	
List all of your strengths here *	
How can you transform these strengths into opportunities? *	
What are your weaknesses? *	
What can you do to improve on these weaknesses? *	
List all of the ways that you can and will improve on these weaknesses? *	
How many hours a week do you spend doing the things that you truly love and enjoy? *	
How much time do you spend doing damage control for your business? *	
How do you feel about this? *	
How many hours a week do you spend on damage control in your personal life? *	
How do you feel about this? *	
Make a list of the people you trust, who would be willing to take the time to give you constructive feedback about your vision *	
Partnerships and Alliances	
group_5fd32cb900f64	
Label	

Supplier Name *	
Main Product Category *	
Account Reference Number *	
Payment Terms arranged with this supplier *	
Discount % on Public Retail Price *	
Rep Name *	
Rep Mobile *	
Head Office Tel *	
Accounts Contact *	
Email for Accounts *	
Email for orders *	
Physical Address *	
Which main products do you buy from this supplier?	
Which main products do you buy from this supplier? *	
What is this suppliers average lead time on orders? *	
What is the orders and logistics process when ordering from this supplier? *	
Do you have product manuals from this supplier? *	
Do you have any product brochures from this supplier? *	
Does this supplier offer product repairs? *	
What is their repairs policy? *	
Describe the process for sending products back to this supplier for repairs *	
Does this supplier offer a defects and manufacturer warranty? *	
Provide Manufacturer Warranty Details *	
Does this supplier offer refunds? *	
What is the refunds policy for this supplier?	
What is the process for managing refunds with this supplier? *	
Paid Ad Campaign Planner	
group_60142b404fc4e	
Label	
Internal Title	
Focus Keyword or Keyphrase	
- Keyword, phrase or search terms	
- Top of Page CPC	

- Bottom of Page CPC	
What days and times of the week are customers most likely to be searching for these products?	
Ad Delivery Location	
Where does this Ad Link to?	
Paid Ad Campaign	
group_5fd2777f50199	
Label	
What platform are you advertising on? *	
Which of your buyer personas is this advertising campaign focused on? *	
What action do you want customers to take when they see your ad? *	
What are your goals and objectives for this ad? *	
Ad Campaign Start Date *	
Ad Campaign End Date *	
How long will you run this ad for? *	
What is your ad budget for this period? *	
Focus Keyword or Keyphrase for this ad *	
How often is this keyword / keyphrase searched for each month *	
Top of Page CPC for this Keyword *	
Bottom of Page CPC for this keyword *	
Ad Delivery Location *	
What days and times of the week are your ideal customers most likely to be searching online *	
Where will this ad link to? *	
Additional Notes for this Ad *	
New Distribution Network	
group_6001818426c25	
Label	
Which location would you like to expand to?	
Describe your idea for expansion	
Which products would you like to distribute within this location	
What opportunities are available in this new location?	
What challenges or barriers present themselves in this new location or distribution network?	

Overdue Calculator	
group_5fd2fe6331e7b	
Label	
Account Name *	
Allocation *	
Amount *	
Due Date *	
How much money do you need to cover all of your existing debt and start with a clean slate? *	
Onboarding	
group_60e5a3c6d7fd3	
Label	
Profile Photo *	
First Name *	
Last Name *	
Gender	
Age	
Country	
City	
Idea Name *	
Idea Tagline *	
Primary Country of Operation *	
Transacting Currency *	
Language *	
Current Business Stage Of Business *	
Plan Start Date *	
Desired Launch Date *	
Monthly Turnover for the last 12 months *	
Current Marketing Message *	
Date Established *	
Industry Vertical *	
Type of Company *	
Marketplace Served *	
Ownership Type *	

Company Size *	
Primary Areas of Operation *	
Acceptable Payment Methods *	
Beneficiary Name *	
Bank Name *	
Bank Account Number *	
Account Type *	
Branch *	
Branch Code *	
SWIFT Code *	
Payment Instructions for Customers *	
Financial Year Start Date *	
Desired Monthly Turnover for the next 12 Months *	
Desired Monthly Profit *	
Official Business Information	
group_60ebf71f15dc8	
Label	
1.Registered Business Name *	
2.Business Registration Number *	
3.Registered Physical Address *	
4.Registered Tel *	
5.VAT Registration Number *	
6.Are you BEE registered *	
7.BEE Level *	
8.BEE Registration Number *	
9.Registered Email *	
10. Company Registration Date *	
11.Type of Company *	
12.Type of Ownership *	
13.Country of Registration *	
14. Size of Company	
15. Financial Year Starts *	
18. Years in Operation *	

16. Transacting Currency *	
17. Accepted Methods of Payment *	
19. Certified Copy of Annual Returns	
20. Certified Copy of Company Registration	
21. Certified Proof of Business Address	
22. Certified Proof of Banking Details	
23. Certified BEE Certificate	
24 Owner ID Copies	
25. Certified Tax Clearance Certificate	
26. VAT Registration Certificate	
27. Primary Language	
New Starter Email Account Credentials	
group_5fff1bf2080a6	
Label	
Name and Surname	
Email Address	
Password	
Incoming Server	
Outgoing Server (SMTP)	
SMTP Authentication:	
SMTP Port:	
Webmail URL	
Department	
Should this email recipient encounter any problems with their email who will they contact? Include Name, Tel, Email and Ticketing Support	
New Refund or Credit Note	
group_5ffee754b03eb	
New Customer Journey	
group_612ccd52cc1df	
Label	
Today's Date *	
About Your Business *	
- Which marketplace do you serve? *	

- Industry Vertical *	
- What stage of business are you in? *	
- Describe the main opportunities available to you: *	
- What is your big picture mission? *	
- Describe the main challenges, pitfalls and hurdles your business is facing *	
- Describe your current situation *	
- Do you have terms and conditions of business? *	
- Are your products and services seasonal? *	
- When are your busiest seasons annually	
- Do you offer *	
- How many years of expertise do you have within the industry? *	
- In which Time Zone do you operate? *	
- Financial Business start date *	
- Average Monthly T/O in the past 12 months. *	
- Desired Monthly T/O in the next 12 months *	
<u>Project Summary *</u>	
- What are your main goals for this digital project? *	
- How will your digital brand generate more revenue? *	
- Do you already have a domain name for your brand? *	
- Existing Domain Name *	
- Existing Host *	
- Desired Domain *	
- How much website traffic do you anticipate? *	
- How many email accounts do you need? *	
- Will you require user restricted access to any areas on your website? *	
- Do you require any special integrations, features or functionality? *	
<u>About your Brand *</u>	
- Brand Name *	
- Brand Tagline *	
- List 3 direct, local competitors competing with you for market share. *	
- List 3 Global brands you aspire to be like *	
- List 3 Local Industry Trends *	
- List 3 Global Industry Trends *	

- Where are your primary operating locations? *	
- What is your current marketing message to customers? *	
- If you are advertising at the moment, do your ads get visits/views or results? *	
About Your Customers *	
- Describe Your Perfect Customer	
<u>Products Manager *</u>	
- How many products do you sell *	
- What type of products do you sell? *	
- What are your main product categories? *	
- Do you have high-quality images of all of your products? *	
<u>Services Manager *</u>	
- How many services do you offer? *	
- Types of services do you offer?	
- Main Service Categories	
- Do you have portfolio items and case studies for these services? *	
How do customers currently access your products and services? *	
<u>List your top 5 lead generation channels *</u>	
- Channel Name *	
- How many enquiries or visits does this channel generate? *	
- Of these visit or enquiries, how many are converting to qualified leads? *	
- Of these qualified leads, how many are converting to customers? *	
- What is the average revenue generated from this channel? *	
How do you serve? *	
<u>Monthly Operating Budget</u>	
group_5ffee74005fb0	
Label	
<u>Operating Costs</u>	
- Beneficiary Name	
- Expense Category	
- Amount	
- Due Date	
<u>Monthly Budget Calculator</u>	

group_5fd34f6c33690	
Label	
Name *	
Allocated Department *	
Amount *	
Frequency *	
Money Log	
group_5ffee43fee09f	
Label	
Log Type	
Category	
Amount / Value	
Transaction Type	
Marketing Campaign Planner	
group_5fd22580e54b0	
Label	
Campaign Title *	
What will this campaign focus on? *	
Which one specifically *	
What types of creative content will you create for this campaign? *	
Blog Article Details	
Across which distribution channels will you share this campaign? *	
What goals will be achieved from this campaign? *	
How will you track, monitor and measure the success of this campaign? *	
What is the URL of the page this campaign will send customers to? *	
Which buyer group or persona is this marketing campaign targeted at? *	
Campaign Start Date *	
Campaign End Date *	
Total Duration of the campaign? *	
Allocated Budget	
What type of campaign is this? *	
Where will you focus on marketing this campaign? *	
How have you set the campaign goals for this campaign on	

What Buyer Persona is this campaign focused on?	
Affiliate Marketing Partnerships	
group_601880bebc010	
Label	
Platform Name *	
Username	
Login Email	
Commission Details	
Commission %	
Commission Payout Frequency	
Referral Link ID	
Account payments are received to	
Membership 2	
group_5fdc633b6bc59	
Label	
Organization Name *	
Login URL *	
Membership Fee *	
Renewal Date *	
Email Login *	
Username *	
API *	
Membership 1	
group_5fdc6169ecb71	
Label	
Organization Name *	
Login URL *	
Membership Fee *	
Renewal Date *	
Email Login *	
Username *	
API *	
Assets and Liabilities Tracker	

group_5ffee8594aac5	
Marketing Campaign Manager	
group_60eea4bf6c194	
Label	
Paid Marketing Campaign Planner *	
- Marketing Campaign Title *	
- Product or service being advertised *	
- Focus Keyword / Keyphrase *	
- - Top of page CPC for this keyword *	
- - Bottom of page CPC for this keyword *	
- - Average monthly searches *	
- - Focus Location *	
- What action must customers take? *	
- What is your goal for this campaign? *	
- Buyer Group or Persona focus *	
- Where does this ad link to? *	
- Where will this ad be published? *	
- Which locations will this ad target? *	
- Ad Campaign Start Date *	
- Ad Campaign End Date *	
- Total campaign duration *	
- What is your budget for this advertising campaign? *	
- Best Days and Times *	
- Additional Notes for this Advertisement *	
Content Marketing *	
- What topics will you discuss on your blog and social media? *	
- What will your cornerstone blog and content categories be? *	
Market Viability Analysis	
group_604b2ee855bec	
Label	
Niche	
PATHWAY: How easily can you target your customers online?	
PATHWAY: Which social media platforms dominate your niche?	

PATHWAY: List all interests, experts, publications, groups and associations within your industry	
PRESENCE: Can you be considered the "Go To Provider" for your industry?	
PRESENCE: How competitive is this niche?	
PRESENCE: List and describe the types of messaging being used in the industry	
PROFIT: Can customers afford your product or solution?	
PROFIT: What is the size of this niche? How many potential customers are there?	
PROFIT: Is there potential for recurring revenue within this niche?	
PROBLEM: Is there an explicit need for what you are offering?	
PROBLEM: What are the monthly search volumes for what you're offering, within your operating location?	
PROBLEM: Is the marketplace or problem growing?	
PROBLEM: How can you solve this problem, cheaper - better - faster?	
PASSION: Who would you help for free?	
PASSION: What do people usually tell you that you're good at?	
PASSION: What comes easily to you?	
Market Analysis Report	
group_5fd773577b5c0	
Label	
Major Industry Highlights *	
If you are reviewing one or multiple specific countries, list them here *	
Set the scene from a global perspective in relation to your products and services *	
List global industry statistics for the last 3-5 years *	
List at least 5 specific and memorable world situations in relation to your industry *	
List any recent marketplace developments over the past 3 to 5 years *	
Local Funnel Builder	
group_5fff502fadcb0	
Lead Generation Website Planner	
group_5fd35d5544633	
Label	
List all landing pages here *	

List all inner pages here *	
Typical Customer FAQs *	
Webmaster Email *	
Website Username *	
Website Password	
<u>Users Role Access Requirements *</u>	
<u>Summary</u>	
Do you have professionally taken photographs of you on your website? You want to use the highest quality photos of yourself, your products, team and stock images *	
Do you have several testimonials on your website? *	
Do you have a clear call-to-action? What is it that you want visitors to your site to do? *	
Blog Post Categories *	
What free resources will you give away? *	
Do you have links to all your social media profiles? *	
Do you have a clear "Services" page? Your services page should clearly list all the different services that you offer, as well as what's included with each service. Be as detailed as possible in listing what's included in your services. *	
Do you have a way for visitors to contact you? *	
<u>Lead Generation Channels</u>	
group_601428cf6aa62	
Label	
<u>Lead Generation Channels</u>	
- Platform Name	
- Lead Generation Method	
- Lead Capture Process for this Channel	
- Username	
- Email Address	
- Leads Target for this channel	
- Average No. of Leads per month	
- How many of these leads typically convert to customers	
- Is this a:	

- Average Turnover Value of Each Sale or Booking	
- Profit Value of Each Sale or Booking	
- Promotional or Marketing Materials Used for this Channel	
- Average Total Turnover Achieved from this channel each month	
Launch Email Framework	
group_5fd3655972d8f	
Label	
Email Subject Line *	
What is the promise of this email? *	
What problems will this email solve for customers? *	
Describe the pains and frustrations your customers are currently experiencing *	
What action steps must be taken for customers to achieve the outcome they are after? *	
Reveal what life will be like once they have followed this process. Specifically address their desires and aspirations *	
Describe what will happen if the customer does not take action *	
Initiate an interactive conversation by asking customers directly for feedback or asking a specific question. *	
Add context *	
What will the main call to action for this email be? *	
What will happen if they do take action? *	
What proof can you share to validate your positioning? *	
How will you inspire action? *	
Create a sense of urgency, or a fear of loss that will compel your customers to take immediate action. Make it a personal challenge for them *	
Keywords Manager	
group_5fd364823378c	
Label	
Keyword, term or phrase *	
Average Monthly Searches *	
Focus Location *	
Top of Page CPC *	
Bottom of Page CPC *	
Key Business Identifiers	

group_5fd21c119b35a	
Label	
Big Idea Name *	
Tagline / Slogan *	
How do you serve? *	
Marketplace *	
Primary Industry Vertical *	
How many years has your business been operating within this industry? *	
What is the size of the company? *	
What are your current and specific challenges, pitfalls and barriers? *	
Average Monthly Turnover in the Past Year *	
Desired Turnover over the next 12 months *	
Describe how you serve your customers *	
How do customers access your services? *	
Busy Months *	
What makes your business the best choice for customers? Why will they choose you? *	
Main Locations *	
How does your business generate profits? *	
Main Business Goals *	
Incoming Leads Tracker	
group_5fd367d818ff1	
Label	
Platform Name *	
How many leads on average does this platform generate each month? *	
What percentage of these convert to customers? *	
Is this a measured value or an estimate? *	
What is the turnover value of each sale or booking you receive from this platform? *	
What is the profit value of each sale or booking generated from this platform? *	
What type of marketing and promotional content will you produce for this platform *	
What is the average turnover generated from this channel each month? *	

Hosting Server Details	
group_5fd2e9a8f412b	
Label	
Domain Name *	
Server IP *	
Hosting Location *	
Server Disk Space *	
Traffic Quota *	
FTP Users *	
MySQL Database *	
Daily Backups *	
SSL Encryption *	
Daily Backups *	
SSL Encryption *	
Control Panel URL *	
Control Panel Username *	
Control Panel Password	
FTP Host *	
FTP Username *	
FTP Password *	
Gross Margin Calculator	
group_5ffee57edc1fd	
Goals	
group_60f3395debf61	
Label	
Goals	
Email, Internet and Communications Policy	
group_5fff1d567d42f	
Email Marketing	
group_5fff4e03330f0	
Label	
How will you create meaningful connections with new and existing customers with email marketing?	

How will you approach prospects to generate new leads and drive more sales?	
Email Campaign Audit	
group_5fff1124c2561	
Label	
Audit Date	
Were your goals achieved?	
Campaign Name	
Campaign Start Date	
Campaign End Date	
Total Campaign Costs	
Most Clicked On Links	
Total Links Clicked	
Audience Growth Rate Percentage	
Total Unsubscribed	
Total Opens	
Total Spammed	
Total Conversions	
By how much did customer engagement increase	
Based on this audit how did it cost per link clicked?	
Based on this audit, what was the estimated cost per conversion?	
Editorial Calendar	
group_5fff4f4e33dbb	
Label	
Main Content Topics	
Dress Code Policy Generator	
group_5fff1d465b023	
Book a Trip	
- Customer Name	
- Contact Number	
- Order Number	
- Type of Trip	
- Invoice Number	

- Delivery Address	
- Delivery Notes	
- Delivery Note Number	
- Customer Email Address	
Category Manager	
group_5fd38da68908a	
Label	
Category Type *	
List all of the options for this category *	
What are the main options *	
What are the products in this category used for? *	
What popular branded products do you offer within this category? *	
Who are your main service providers, suppliers and partners in relation to this category? *	
Changing Your Perception	
group_607c04802f799	
Label	
I like to show my feelings	
I don't like to meet new people	
I find I do not get close to many people	
I usually approach life in a positive way	
I am not always sure of my true feelings	
I am able to express my ideas easily	
I spend a lot of time worrying about what other people think of me	
I am a good listener	
I usually put other peoples needs before my own	
I know how to trust my intuition	
I tend to be self-critical and put myself down	
I am critical of others	
I would most like to change about myself:	
I would like more:	
The most important things in my life right now are	
The most important people in my life right now are	
The 5 people I respect and admire most and why	

I would be thrilled if my life included	
I enjoy my own company	
I feel confident starting something new	
I find it hard to say no	
I enjoy making new friends	
I love getting to know new people	
Cash Flow Projection	
group_5fd34e2c09a49	
Label	
How much cash do you currently have on hand? *	
What income are you expecting? *	
Of this, how much is actual income? *	
What do you expect to payout during this period? *	
How much did you actually pay out for this period? *	
Campaign Builder	
group_5fff1005f0a45	
Label	
Type of Campaign	
Internal Campaign Name	
Campaign Title	
Main Subject Line	
Campaign Links To	
Mailing List to Send to	
Focus Audience (Buyer Group / Persona)	
Campaign Focus Keywords	
Campaign Budget	
Campaign Goals	
Campaign Introduction	
Business Processes Manager	
group_5fd32fa00df13	
Label	
Give this process a title *	
Which department is responsible for managing this process? *	

Which job role in this department will be responsible for managing this process? *	
What is the goal of this process *	
What is the current situation? Why are you implementing this process? *	
Process Steps *	
What tools are required to carry out this process? *	
What documents are required to manage this process? *	
Under what circumstances is this process activated? *	
When will you start to implement this process? *	
How will you track and measure the success of this process? *	
Business Growth Strategy	
group_60142e4a0f39f	
Label	
Describe Your Business Growth Strategy for the upcoming year	
Describe Your Business Growth Strategy for the upcoming year	
What actions will you take in the next 30 days to achieve these goals?	
What actions will you take this week, to achieve these goals?	
How will your brand be positioned in the next 2 years?	
List at least 5 actionable goals that will help you achieve this vision:	
Brand Colors	
group_6001b00558c3a	
Label	
Primary Color	
Primary Hex Code	
Broad Audience Demographic	
group_5fff50f244eb0	
Label	
Average Age Group	
Gender	
- % Male	
- % Female	
Annual HHI	
Occupation	

Highest Level of Education	
Behaviour Analysis	
Marital Status	
Parental Status	
Parenting Stage	
Homeowner Status	
Common Interests / Values	
Highest Earning Location	
Highest Marketshare %	
Average Earning Location	
Average Marketshare %	
Lowest Earning Location	
Lowest Marketshare %	
Blog Post Creator	
group_60141f93ad07b	
Label	
Blog Post Name	
Blog Article Headline	
What question are you answering?	
Article Introduction	
Table of Contents	
Body Content with Segmented Headers	
What discount, giveaway or lead magnet will you include?	
Visual Focus	
Summary	
Call to Action	
Brand Development Manager (copy)	
group_60f47b651a201	
Label	
Customer Billing Information *	
- Brand Name	
- First Name	
- Last Name	

- Designation	
- Mobile Tel	
- Primary Email Address	
- Postal Address	
- Billing Address	
<u>- Registered Business Information *</u>	
- - Registered Business Name *	
- - Business Registration Number *	
- - Registered Physical Address *	
- - Registered Tel *	
- - VAT Registration Number *	
- - Are you BEE registered *	
- - BEE Level *	
- - BEE Registration Number *	
- - Registered Email *	
- - Type of Company *	
- - Type of Ownership *	
- - Size of Company	
- - Company Registration Date *	
- - Financial Year Starts *	
- - Years in Operation *	
- - Transacting Currency *	
- - Accepted Methods of Payment *	
- - Country of Registration *	
<u>Domain Information *</u>	
- Domain Package *	
- Domain Name *	
- Domain TLD *	
- Include SLL Encryption *	
- Include Incremental Backups *	
- Current Hosting Provider *	
<u>- Domain Ownership Information *</u>	
- - Ownership Type *	

-- Owner Name *	
-- Business Name *	
<u>-- Contact Information *</u>	
--- Contact Person *	
---- Title *	
---- First Name	
---- Last Name	
--- Designation	
--- Contact Number	
--- Email Address	
-- Physical Address *	
<u>-- Administrative Contact *</u>	
--- First Name	
--- Last Name	
--- Contact Number	
--- Email Address	
-- Authorization and Liability *	
-- Validation	
<u>- Domain Details</u>	
-- Domain Name	
-- Activation Date *	
-- Billing Frequency *	
-- Domain Renewal Date *	
-- Domain Renewal Fee *	
-- Sub Domains *	
-- Multiple Domains	
-- Redirects *	
-- Current Status	
-- Parked Domains *	
- DNS Information	
- Primary DNS:	
- Secondary DNS	
- Third DNS	

- Fourth DNS	
- Domain Activation Date *	
- Billing Frequency *	
- Domain Renewal Date *	
- Domain Renewal Fee	
- Domain Registration Terms at a Glance	
- SSL Encryption Details *	
Hosting Information	
- Hosting Package *	
- Billing Frequency *	
- Activation Date *	
- Renewal Date *	
- Hosting Package Details *	
- - Hosting Server	
- - Server IP Address	
- - Server Disk Space	
- - Hosting Location	
- - PHP Level	
- - Available Email Accounts	
- - FTP Access *	
- - - FTP Users	
- - - Hostname	
- - - FTP Username	
- - - FTP Password	
- - - Port	
- - My SQL Databases	
- - Traffic Quota	
- Control Panel Credentials *	
- - URL	
- - Username	
- - Password	
- - Instruction Manual	
- First Invoice Date *	

<u>Email Account Credentials</u>	
Email Account Information *	
- Available Email Accounts *	
- Webmail URL *	
- Webmaster / Catchall Email *	
<u>- Email Credentials *</u>	
- - Username	
- - Password	
- - Incoming Server	
- - Outgoing (SMTP) Server	
- - SMTP Authentication	
- - SMTP Port	
<u>Discovery Workshop *</u>	
<u>- Business Concept *</u>	
- - How do you serve? *	
- - How do you do this? *	
- - Problem that you solve *	
- - Which areas do you solve this *	
- - What percentage of people are facing this problem in these areas? *	
- - How big or serious is this problem for these people? *	
- - How do you solve this problem? *	
- - Why is your business the best choice to solve this problem? *	
- - How will customers access your products and services? *	
- - When are the busiest annual periods for your business? Is it seasonal? *	
- - Describe your business model and how it generates profit *	
<u>- Business Information *</u>	
- - List 5 facts about your business *	
- - How do you inspire trust in customers? *	
- - What do customers most want to know about your business? *	
- - List all of your specific business offerings here: *	
- - List any boast worthy credentials here *	
- - How do you deliver value for customers? *	
- - How do you forge a connection with customers? *	

-- Which marketplace do you serve? *	
-- How do currently connect with customers? *	
<u>-- Industry Vertical *</u>	
<u>-- Website Development *</u>	
-- Website Package *	
-- Project Start Date *	
-- Project Deadline *	
-- Developed on *	
<u>-- Webmaster Credentials *</u>	
--- Login URL	
--- Registered Email	
--- Login Username	
--- Login Password	
--- Access Level	
<u>-- Website Framework *</u>	
--- Framework Name	
--- Framework License Fee	
--- Framework Documentation URL	
--- Framework Support Expiry *	
<u>-- Website Goals</u>	
<u>-- User Roles and Permissions *</u>	
--- Username	
--- User Role	
--- Description	
--- Registered Email Address	
--- Password	
--- Permissions *	
<u>---- eCommerce Functions *</u>	
<u>-- 3rd Party Scripts, Integrations and API's *</u>	
--- Type *	
--- Name	
--- Cost *	
--- Billing Frequency *	

--- License Renewal Date	
--- Renewal Fee	
--- Description / Purpose / Function / Integration Notes	
--- License Key / API or Tracking Code	
-- Recommended Integrations *	
- <u>Website Maintenance *</u>	
- <u>eCommerce Platform *</u>	
-- Total Number of Products *	
-- How do you source your products? *	
-- What types of products do you sell? *	
-- Transacting Currency *	
-- <u>Utility Pages</u>	
- - - <u>Cart Page *</u>	
---- Contact Information	
---- Risk Reversal Warranty Banner *	
---- Required Checkout Fields *	
---- Secure Payment Methods *	
---- Terms Acceptance Checkboxes	
---- Social Proof *	
---- Reviews *	
---- List of Checkout Benefits *	
- - - <u>Checkout Page *</u>	
- - <u>Physical Address (Store or Depot)</u>	
--- Address Line 1 *	
--- Address Line 2 *	
--- City *	
--- Country *	
--- Province / State *	
--- ZIP / Postal Code *	
--- Weight Unit *	
--- Dimension Unit *	
-- How do customers receive their products? *	
-- How do you charge for product delivery? *	

<u>-- Shipping and Delivery Options *</u>	
--- Location Name	
--- Lead Time for this location	
--- Available Delivery Methods *	
--- Flat Rate Delivery Fee *	
--- Do you offer free shipping under any circumstances? *	
--- Under which circumstances will you offer free shipping? *	
--- Do you offer a local pickup option? *	
--- From which location may customers collect their goods? *	
--- Notes about delivery *	
--- To which specific locations do you not deliver to?	
<u>-- Acceptable Payment Methods *</u>	
<u>-- Banking Details for Incoming Payments *</u>	
--- Beneficiary Name	
--- Bank Name	
--- Account Number	
--- Account Type	
--- Branch	
--- Branch Code	
--- SWIFT Code	
--- Payment Instructions for Customers *	
--- Email Address to Send POP to *	
<u>-- Payment Gateway Information *</u>	
--- Payment Gateway Name *	
--- Username *	
--- Login Email *	
--- Password *	
--- Merchant Key *	
--- Merchant ID *	
--- Passphrase *	
--- Summary of Transactional Fees *	
--- Payment Gateway Banner *	
<u>-- Transactional Emails *</u>	

--- To which email address will new orders be sent to? *	
--- New Order *	
--- Cancelled Order *	
--- Failed Order *	
--- Order On Hold *	
--- Processing Order *	
--- Completed Order *	
--- Refunded Order *	
--- Customer Invoice / Order Emails *	
--- Customer Note *	
--- Reset Password *	
--- New User Account *	
<u>--- Email Sending Options *</u>	
----- Sender Name *	
----- Sender Email *	
<u>--- Email Design Options *</u>	
----- Email Header Image *	
----- Footer Text *	
----- Base Color *	
----- Background Color *	
----- Body Background Color *	
----- Body Text Color *	
-- Do you have high-resolution product images available for all of your products? *	
-- Do you have an excel spreadsheet with all of your products and accurate pricing available? *	
<u>-- eCommerce Features *</u>	
-- Main Categories *	
--- Category Name	
--- Category Type *	
<u>Brand Marketing *</u>	
<u>- Brand Identity *</u>	
-- Logo *	

--- Primary Logo Mark *	
--- Text Logo Mark *	
--- Favicon *	
-- <u>Color Palette *</u>	
--- Primary Color *	
--- Secondary Color *	
--- Tertiary Color *	
--- 3 Accent Colors *	
---- Color 4	
---- Color 5	
---- Color 6	
-- <u>Graphics, photos and visuals *</u>	
--- Graphics *	
---- Describe the types of graphics that will portray your brand best *	
---- Upload some examples (Existing or Inspired) *	
--- Visuals *	
---- Describe the types of visuals that will portray your brand best *	
---- Upload some examples (Existing or Inspired) *	
--- Textures *	
---- Describe the types of textures that will portray your brand best *	
---- Upload some examples (Existing or Inspired) *	
--- Photos *	
---- Describe the types of photos you will feature *	
---- Preferred Photography Style *	
---- Upload some examples (Existing or Inspired) *	
--- Patterns *	
---- Describe the types of patterns that will portray your brand best *	
---- Upload some examples (Existing or Inspired) *	
--- Sliders *	
---- Describe the types of sliders that will portray your brand best *	
---- Upload some examples (Existing or Inspired) *	
--- Backgrounds *	
---- Describe the types of backgrounds that will portray your brand best *	

---- Upload some examples (Existing or Inspired) *	
- - - Overlays *	
---- Describe the types of overlays that will portray your brand best *	
---- Upload some examples (Existing or Inspired) *	
- - - Banners *	
---- Describe the types of banners that will portray your brand best *	
---- Upload some examples (Existing or Inspired) *	
- - <u>Typography *</u>	
- - QR Codes *	
- <u>Brand Messaging *</u>	
- - <u>Brand Story *</u>	
--- Why did you start your business? What problem were you inspired to solve? *	
--- How did you enter the marketplace? *	
--- How does or will your business give back to the community? *	
--- What does your business stand for? *	
--- Share inspiring, motivating details about actively engaged founders in a way that expresses and defines their passion for this business *	
--- Brand Story Videos *	
- - <u>Brand Definition *</u>	
--- Who are you?	
--- What do you offer?	
--- Who do you offer this to?	
--- What is your business mission *	
--- What is your primary business purpose? *	
--- What is your vision for your business in terms of industry impact? *	
- - <u>Tone, Voice and Personality *</u>	
--- I want my brand to make people feel *	
--- Interacting with clients and potential customers makes me feel: *	
--- 3 Words that best describe my brand are: *	
--- I want to mimic the brand voice of: *	
--- I dislike brand voices that sound: *	
- - <u>Tagline *</u>	

- - Customer Value Proposition (CVP)	
- - Brand Promise *	
--- What underlying guarantee are you offering to customers? *	
--- What is your commitment to customers? *	
--- How does your solution transform life for your customers? *	
- - Unique Selling Proposition *	
--- List 3 brand pillars or strengths that give customers a reason to believe in your business *	
--- How does your brand stand out? What makes your business exclusive or unique? *	
--- What special benefits does your brand have to offer? *	
- - Unique Value Proposition *	
- - Brand Positioning Statement *	
--- Select the most appropriate option *	
--- Our brand is the *	
--- Providing solutions for: *	
--- These customers want, need or desire: *	
--- What is the rational / emotional benefit or promise to customers? *	
--- How will you deliver on this rational/emotional benefit or promise *	
--- Describe why your brand is the best choice for customers? *	
- - Author Biography *	
--- Author Display Name	
--- What specifically do you do?	
--- Validate your skillset here *	
--- What is your level of experience? *	
--- What's the hook? *	
--- Include a referral link *	
- - Elevator Pitch *	
- - CVP *	
--- What does your business do? *	
--- How do you do what you? *	
--- Who do you do this for? *	
--- What makes you different? What's your secret sauce? *	

- - - Where do you excel in relation to your competitors? *	
- - - How badly do your customers want what your business offers? *	
- - - How badly do customers need what you have to offer and why? *	
- - - What are the main benefits of your solutions and offerings? *	
<u>- Distribution Channels *</u>	
- - Social Media Networks *	
- - Citations *	
- - Paid Directories *	
- - Free Directories *	
- - Email Marketing *	
- - Influencer Marketing *	
- - Affiliate Marketing *	
<u>- Public Display Information *</u>	
- - Public Display Name *	
- - Website URL	
- - Head Office Tel *	
- - Head Office Address *	
- - Main Depot / Distribution Center *	
- - Sales Team Tel *	
- - Sales Team Email *	
- - Sales Team Hours *	
- - Support/Contact Center Team Tel *	
- - Support/Contact Center Team Email *	
- - Support/Contact Center Team Hours *	
- - Billing/Accounts Tel *	
- - Billing/Accounts Email *	
- - Billing /Accounts Hours *	
- - Dispatch Tel	
- - Dispatch Email	
- - Dispatch Hours	
<u>- Portfolio Items *</u>	
- - Project Name	
- - Project Category	

- - Duration (From start to finish)	
- - Year Completed	
- - Project Description	
- - Featured Image	
- - Video URL	
- - Client Comments	
- Talking Points *	
- - Editorial Calendar *	
- - - Date *	
- - - Holiday / Event *	
- - Blog Article Categories	
- Brand Assets *	
- - Social Skins *	
- - Product Cards *	
- Focus Keywords *	
- - Keyword or phrase *	
- - - Keyword *	
- - - Region Focus *	
- - - Top of Page CPC *	
- - - Bottom of Page CPC *	
- - - Focus Priority *	
- Professional Accreditations *	
- - Name *	
- - Type *	
- - Notes *	
Brand Definition	
group_60dc34ca1ed09	
Label	
What exactly does your business offer?	
Who do you offer it to?	
What is the purpose of your business?	
What is your business mission?	
What is your vision for your business?	

What is your Business to Business message?	
What is your business to consumer message?	
What is the Unique Selling Proposition of the brand?	
Brand Story	
group_60dc20015228c	
Label	
How did you enter the marketplace?	
How does your brand give back to the community?	
Share a link to a video that shares your brand story or one that can use for inspiration	
Share some inspiring, motivating details about actively engaged founders and their passion for the industry	
What are the ethical values of your brand? What do you stand for?	
Describe the passion behind your brand	
What is your brand mission?	
Why did you start your business? What problem were you inspired to solve?	
How do customers describe your brand?	
How do you describe your brand?	
How do external parties such as the media, industry experts etc refer to your brand?	
How do you intend to change the history of your industry?	
What Issues are Important to You?	