



Taking Your Business to the Next Level

Business Planning Workbook



Whether you're launching a brand-new venture or just trying to take your existing business to the next level, it's important to plan ahead and form a strategy that will deliver the best ROI while setting you up for scalable, sustainable growth. Not sure how to start identifying your business needs? Use this workbook to guide you through the planning process.

When in doubt, just give your local PostNet center a call! We're always here to support your business and help bring your ideas to life.

#1: Branding Your Business

Branding is important for businesses of all sizes. What difference does your branding make? Most crucially, it helps your customers remember you – making you more likely to get repeat business and referrals. Additionally, your branding gives prospective customers a sense of what you stand for and what to expect from working with you. Polished branding also presents a professional image that will attract customers and indicate that your business cares about quality.

Use the following questions to start building your brand identity:

What is your business's name?

What adjectives would you use to describe your business? (Examples: trustworthy, innovative, luxury, eco-friendly.)

Do you have a logo? If not, what imagery could you use to represent your business?

Tip: This could be literal (such as a hammer for a handyman business) or more metaphorical (like an illustration of a pet or a local landmark). The key is to come up with something that your customers will remember and associate with you.

What colors will you associate with your brand?

Tip: If in doubt, consider the common associations of certain colors. For example, green and blue are calming, red represents passion, yellow evokes happiness. Use a color wheel to make sure that your colors are complementary, and be sure that the colors will be visually appealing across all of your business and marketing materials.

Describe your target customer. Include as much detail as possible.

(Such as their age, gender, income, education level, interests, and values.)

What sets your business apart from your competitors?

Describe your business in a few sentences. Think of this as your mission statement or elevator pitch.

#2: How to Grow Your Business

Are customers able to find your business? Do you have the tools you need to network and stay top of mind with business connections and prospective customers? If not, your business will struggle to grow. Let's take a look at your business collateral needs.

Check off which essentials your business already has:

- Business Cards
- Brochure
- Marketing Collateral
- Website

Business Listings/Profiles on:

- Google
- Yelp
- LinkedIn
- Facebook
- Nextdoor

TIP

Even if you already have all of these business essentials, it's important to keep them up to date and consistent with your current branding. Are your materials due for an update?

If you have a storefront, signage is essential to making sure that customers can find you and understand at a glance what you do. Consider these questions to determine what signage you may need.

- Do you have an exterior sign?
- If yes, is it visible from the street?
- Are your hours displayed on your storefront?
- Do you have a sign indicating if you are currently open or closed?
- Is it immediately clear to passersby what your business does?
- Do you have any window decals?
- Inside your store, is it easy for customers to find their way around and locate areas of interest, such as popular products, the cash register, and public restrooms?
- When you are running a promotion or special offer, do you have signage to communicate this?

Notes:

#3: Your Marketing Plan Template

Marketing is essential for every business to find new customers. If you want to grow your business, it's not enough to rely on word of mouth. Marketing materials that could work for your business include targeted direct mail, Every Door Direct Mail®, door hangers, flyers, postcards, and signage around your storefront.

Answer these questions to determine what type of marketing materials will work best for you.

Is your customer base located:

- Anywhere (ie, for an online business)
- In a certain region (such as a county or metro area)
- Hyper local (in a specific neighborhood)

Tip: This question can help you think about where your customers will be most likely to see your advertisements.

Revisit the target customer you described in the branding section. What kind of consumer are they:

- Business consumer
- General consumer

Tip: Depending on whether your business has a B2B or B2C audience, you will need to reach potential customers in different locations – at their place of work or on their commute, or at home.

Revisit the target customer you described in the branding section. What channels do they use to get information?

- They are tech-savvy. They get most of their information online.
- They rely on more traditional channels, such direct mail, printed advertisements, and signage.

Tip: Market your business using the channels that your target audience is most likely to turn to for their purchasing decisions.

If you have a storefront, what type of traffic exposure does it get?

- Pedestrians
- Driving traffic
- Not much traffic (ie, an industrial area)

Tip: Think about how to make your storefront visible to people passing by. Yard signs and A-frame signs are great for pedestrian traffic, while large banners are best for car traffic.

What is your yearly marketing budget? _____

Tip: Marketing doesn't have to break the bank. Stop by PostNet to learn about cost-effective ways you can get the word out.

Co-op marketing is a great way to cut costs. Are there other businesses that you could create co-branded marketing materials with? For example, you could send a mailer with other businesses in your shopping center, or partner up with a complementary business that's located nearby.

What specific goals would you like to achieve, and how will you measure the success of your marketing plan?

#4: Streamlining Your Business Operations

Now, let's take a look at the pain points your business is currently facing. By streamlining your operations, we can free up more time for you and set you up to scale your business.

Which of these areas of running your business are a challenge for you? Check off all that apply.

- Time management
- Hiring/retaining staff
- Keeping track of business-related bills and other mail
- Managing mail while traveling
- Packing and shipping products
- Reaching new customers
- Administrative tasks like making copies and sending faxes
- Getting reviews from customers
- Meeting deadlines
- Making a professional/polished impression
- Making decisions about what print/marketing materials are needed

PostNet is here to help you simplify your business management and recommend solutions for any of these problems. Consult with our staff for ideas to address your biggest challenges.



Let's Get Started!

Hopefully, after completing this workbook, you have some ideas about what you need to accomplish your business goals, whether that's working on your branding, marketing to your target customers, or just making your processes more efficient so that you can focus on serving your customers.

Still not sure? Just bring this workbook to your local PostNet center for a free consultation. PostNet offers a wide range of services that can help take any business to the next level. Plus, we understand the challenges you face and can work with you to create a plan.

Visit [PostNet.com](https://www.postnet.com) or scan the QR code to find your nearest PostNet center, then stop by to get started! We look forward to helping you tackle your business goals.

Find a PostNet Near You



**Contact us today to get
started on your next project!**

POSTNET[®]