

Planner 5th

Strategic Roadmap

Prepared By: *Business on a Budget.org*

Write the Vision. Make It Rain

Planner 5th is a planning company whose foundation rests on three core principles: productivity, organization, and intentionality. Our Day One strategic roadmap is a multifaceted approach that encompasses the following objectives:



STRATEGIC EXODUS | Overview

DAY 1 | Going Digital

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries.

DAY 3 | Get Physical

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DAY 5 | Recurring Revenue

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DAY 2 | Expand Your Reach

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DAY 4 | Expand Your Catalog

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DAY 6 | Physical Location

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DAY ONE | Going Digital

● PRODUCT OFFERINGS

The Planner 5th Day One products will consist of digital planning products across multiple niches and platforms. Our goal is to create products that amplify our core pillars: productivity, organization, and intentionality.

● LEARNING OBJECTIVES

Mastering essential software applications is key to our business's growth and sustainability. By mastering these tools, we will be able to develop and deliver our products more efficiently, aesthetically pleasing, and with enhanced capabilities to meet our customers' needs. This differentiation will set us apart from our competitors in a highly saturated market.

PRODUCT DEVELOPMENT | Goodnotes, Notions, and Google Sheets

CONTENT CREATION | Canva and CapCut

BACK OFFICE | Shopify, Etsy and MailChimp

● MARKETING STRATEGY

Planner 5th's marketing strategy will focus on increasing brand awareness, driving website traffic, and generating leads through a comprehensive social media-driven content strategy centered around YouTube, TikTok, and Pinterest. Our goal is to establish a sustainable content creation cadence while showcasing our product to consumers by leveraging each platform's native capabilities.

● FINANCIAL INVESTMENT

Day One requires minimal financial investment by leveraging free resources for product development.* Funds will primarily be spent on monthly subscriptions to maintain the online platforms used to generate sales (Shopify, Etsy).

● LEGAL & COMPLIANCE

STATE REGISTRATIONS & FEDERAL EIN | The state registrations will validate our presence and compliance within the states we operate, while an EIN will ensure smooth taxation processes.

TRADEMARKS | With an international trademark, we can uniquely identify ourselves and safeguard our brand reputation both domestically and internationally.

USAGE AGREEMENTS | Usage agreements will act as the binding terms and conditions, outlining the limitations on distribution, modification, and sharing of digital product.

● ORGANIZATION

Planner 5th's organization will include one owner to run and manage its operations. As funds become available, or if time limitations necessitate additional assistance, we may engage freelancers to aid in creating and editing marketing content.

● GOALS & MILESTONES

Before proceeding to Day Two, it is imperative that the goals and milestones are achieved. This will ensure that we have the necessary skills, protections, systems, and financial resources to support the growth and development on Day Two.

■ **LEARN YOUR CRAFT** | Can you efficiently create digital products and social media content or do you continue to face production challenges due to limited software knowledge?

■ **BUILD AN AUDIENCE** | Are you able to identify the demographics of your target audience based on social media analytics gathered by maintaining a consistent posting schedule?

■ **GENERATE INCOME** | Have you been able to generate a consistent income that covers both a salary payout and business expenses, with surplus funds available to support future investments?

■ **PROTECT THE BUSINESS** | Have you completed all necessary state registrations? Do you have your EIN? Have you trademarked your brand? Do all of your products have usage agreements as a condition of purchase?

■ **DEVELOP SYSTEMS** | Do you have repeatable standard operating procedures in place for all of your marketing and back office operations?



Social Media Content Planner - BUTTERSCOTCH

File Edit View Insert Format Data Tools Extensions Help

AY32

MONTHLY CONTENT PLANNER

JANUARY

LINKS 11 12 13 14 15 21 22 23 24 25 31 32 33 34 35 41 42 43 44 45 51 52 53 54 55 61 62 63 64 65 YEARLY IDEA BANK

CONTENT PILLAR		PLATFORM		PURPOSE	
CONTENT... 10.0%	CONTENT... 10.0%	PLATFORM... 10.0%	TIKTOK 10.0%	PROMOTION 16.7%	
CONTENT... 10.0%	CONTENT... 10.0%	PLATFORM 9 10.0%	IG POST 10.0%	CONNECTI... 16.7%	
CONTENT... 10.0%	CONTENT... 10.0%	PLATFORM 8 10.0%	IG REEL 10.0%	CONVERS... 16.7%	
CONTENT... 10.0%	CONTENT... 10.0%	PLATFORM 7 10.0%	SMS 10.0%		
CONTENT... 10.0%	CONTENT... 10.0%	YOUTUBE 10.0%	EMAIL 10.0%		

WEEK 1

1	2	3	4	5
Sunday	Monday	Tuesday	Wednesday	Thursday
TIKTOK -	IG POST -	IG REEL -	SMS -	EMAIL -
IMAGE/STORIES/THUMBNAIL	IMAGE/STORIES/THUMBNAIL	IMAGE/STORIES/THUMBNAIL	IMAGE/STORIES/THUMBNAIL	IMAGE/STORIES/THUMBNAIL

HOW-TO CUSTOMIZE SETUP FEED BRAND IDEAS AFFILIATE GROWTH YEARLY 01 02 03 04



DAY TWO |

● PRODUCT OFFERINGS

Day Two is designed to lay the foundation for Day Three product launches. Design and development of physical planners, notebooks, pens, and stickers will commence.

Current product offerings will remain focused on digital planning while the development phase of physical products commence.

● LEARNING OBJECTIVES

SOCIAL MEDIA ADVERTISING | The goal is to master the creation, monitoring, and optimization of advertising campaigns to achieve maximum results as measured by such metrics as impressions, reach, conversions, and CTR.

AFFINITY BY SERIF | Affinity by Serif—a suite of professional design software that can be used to create layouts for physical planner products, vector graphics, and photo editing and retouching. This software will replace the use of Canva, streamlining our software requirements.

As Planner 5th continues to grow, it becomes increasingly vital to create products that cater to existing customers and entice new audiences by diversifying our product categories. In anticipation of Day Three, our learning objectives will prioritize software proficiency to support this product expansion.

Expanding Our Reach

● MARKETING STRATEGY

Day Two marketing will move into paid social media advertisements. The strategy will focus on Pinterest, Instagram, and Facebook advertising, but will remain flexible to accommodate any new developments in the social media landscape.

To support advertising spend, Planner 5th will continue to maintain it's Day One content creation calendar to attract and nurture customers.

The marketing strategy has two objectives: to boost sales to fund investment in the product development of physical planners and to expand audience reach to support the Day Three launch of the physical products.

● FINANCIAL INVESTMENT

ADVERTISING SPEND | A portion of retained earnings and any business grants or credit will be used to fund advertising spend.

PRODUCT DEVELOPMENT | Investment will be needed to fund product development initiatives, including product samples, product packaging, mailing and shipping supplies, and initial inventory purchases. A one-time fee will also be required to purchase Affinity by Serif software.

FUNDING INITIATIVES | Apply for business grants, credit, and loans to fund business expansion. Any additional documents needed to support these applications will be drafted.

● ORGANIZATION

The organization will continue to consist of one owner to run and manage all operations. Freelancers, contractors, or consultants may be engaged to support product development initiatives or creating and editing marketing and advertising content.

● GOALS & MILESTONES

■ **PRODUCT DEVELOPMENT** | Are product and packaging samples of high quality. Do they meet brand standards?

■ **ADVERTISING RESULTS** | Is revenue increasing from conversions in ad spend? Are ad metric meeting or exceeding industry standards?

■ **AUDIENCE GROWTH** | Are subscribers, followers, and website traffic continuing to increase? Are engagement metrics meeting or exceeding industry standards?

■ **SUPPLY CHAIN** | Do you understand the supply chain and potential risks that could impact inbound product delivery?

■ **DEVELOP SYSTEMS** | Do you have repeatable procedures in place to monitor, analyze, and optimize marketing and advertising results? Are procedures in place to track inbound freight, inventory management, order fulfillment, and shipping?



DAY THREE | Get Physical

● PRODUCT OFFERINGS

Launch physical products which will include physical planners, notebooks, pens, and stickers. This may also include other merchandise such as t-shirts, hoodies, coffee cups, travel mugs, and other accessories with the Planner 5th logo.

Current product offerings will continue to support digital planning products, although development will shift primarily to physical products.

● LEARNING OBJECTIVES

Focus will be placed on business optimization, customer feedback and supply chain management.

BUSINESS MANAGEMENT | With the need for a supply chain and the anticipated Day 4 catalog growth and headcount addition, it is important to implement an ERP solution (Odoo) to manage all aspects of the business in a central space.

HUMAN RESOURCE DEVELOPMENT | Day Four will require additional headcount to support catalog growth. Payroll software will need to be deployed in anticipation of that.

CUSTOMER FEEDBACK | With the entry into physical products, focus will be centered on best practices in gathering customer feedback and creating the appropriate feedback loop to address any concerns or implement customer ideas and requests.

● MARKETING STRATEGY

The marketing strategy will continue to utilize paid social media advertisements and will remain flexible to accommodate any new developments in the social media landscape.

Planner 5th will continue to maintain it's Day One content creation calendar to attract and nurture customers.

● FINANCIAL INVESTMENT

Day Three will continue to follow the Day Two strategy, with continued investment into physical product development and advertising spend. Efforts will continue to be made to secure funding through business grants, credit, and loans.

Funds will be allocated to the Odoo ERP solution which requires a monthly subscription.

● ORGANIZATION

The organization will continue to consist of one owner to run and manage all operations. Freelancers, contractors, or consultants may be engaged to support product development initiatives or creating and editing marketing and advertising content.

Prior to Day Four, review Planner 5th's recurring businesses processes and document all remaining SOPs for inclusion in an Employee Handbook.

● GOALS & MILESTONES

■ **ERP IMPLEMENTATION** | Have you implemented the ERP system and created/updated SOPs for any new business processes?

■ **EMPLOYEE HANDBOOK** | Have you consolidated your SOPs for the creation of an employee onboarding manual?

■ **AUDIENCE & REVENUE GROWTH** | Are you continuing to see returns on ad revenue and continued audience growth?



DAY FOUR | Catalog Expansion

● PRODUCT OFFERINGS

Expand physical product catalog of planners, notebooks, pens, stickers, wall and desktop calendars, sticky notes, and organizers to offer more design styles and layouts that cater to a broader audience. Other merchandise such as clothing items, mugs, and pins will also be expanded to cater to varying styles, colorways, and patterns.

Current product offerings will continue to support digital planning products. More design styles, layouts, and colorways will be developed alongside their physical product counterparts.



● LEARNING OBJECTIVES

Focus on managing the business through the newly deployed ERP system. This includes managing staff, supply chain, inventory, and product development, and project management.

WAREHOUSING | With the expansion of the physical product catalog, additional storage or warehousing may be required. Given the Day Six goal of expansion into physical brick and mortar location, storage or warehousing would need to be on a short-term basis.

● MARKETING STRATEGY

The marketing strategy will continue to utilize paid social media advertisements and will remain flexible to accommodate any new developments in the social media landscape.

Planner 5th will continue to maintain its Day One content creation calendar to attract and nurture customers.

● FINANCIAL INVESTMENT

Financial investment will continue to focus on physical product development and advertising spend. Efforts will continue to be made to secure funding through business grants, credit, and loans.

Funds will be allocated to support the additional headcount needs on the design team.

● ORGANIZATION

The organization will consist of one owner to run and manage all operations along with one designer who will focus on expanding the product catalog.

Freelancers, contractors, or consultants may be engaged to support product development initiatives or creating and editing marketing and advertising content.

● GOALS & MILESTONES

■ **SYSTEMS** | Are you able to manage the business through the ERP system? Are you able to retrieve data for analysis and decision making?

■ **HUMAN RESOURCES** | Was the new employee onboarding successful? Have periodic performance checkpoints and goal setting been established?

■ **AUDIENCE & REVENUE GROWTH** | Are you continuing to see returns on ad revenue and continued audience growth?

■ **WAREHOUSE MANAGEMENT** | Have you assessed your inventory storage needs? Is additional space needed to house the expanded product catalog? How much space is needed? Have you secured the necessary space to meet your inventory needs?

DAY FIVE | Recurring Revenue

PRODUCT OFFERINGS

Launch a quarterly subscription box filled with products from the expanded physical catalog. The box will also include helpful tips that reinforce Planner 5th's brand pillars of productivity, organization, and intentionality.

Investment will continue in expanding the current physical product catalog.

The outcome of an assessment of the profitability of the digital product catalog will determine whether to continue digital product investment or to sell that portion of the business.

LEARNING OBJECTIVES

Focus on managing the production of the subscription box. Additional support may be needed to integrate this product into the ERP system.

CUSTOMER FEEDBACK | With the addition of the subscription box into the product offering, additional focus will be placed on assessing customer feedback for potential issue or suggestions for improvement.

MARKETING STRATEGY

Begin using influencer marketing to support the launch of the subscription box.

The marketing strategy will continue to utilize paid social media advertisements and maintain historical content creation outlet to attract and nurture customers. The cadence and platforms used will remain flexible to accommodate business resources and new developments in the social media landscape.

ORGANIZATION

Additional headcount will be needed to support the introduction of the subscription box service, particularly for order fulfillment.

With continued product expansion, additional headcount will be needed to support product design.

Assess the use of freelancers, consultants and contractors, particularly in support of marketing and content creation. Shift from external marketing to an internal marketing department.

FINANCIAL INVESTMENT

Financial investment will continue to focus on physical product development and advertising spend. Efforts will continue to be made to secure funding through business grants, credit, and loans.

Funds will be allocated to support the additional headcount needs on the design team and order fulfillment.

GOALS & MILESTONES

■ **ERP UPDATE** | Has the ERP system been updated to support the launch of the subscription box? Have SOPs and other business processes been updated?

■ **HUMAN RESOURCES** | Have you filled all open positions to support product design, marketing and order fulfillment?

■ **AUDIENCE & REVENUE GROWTH** | Are you continuing to see returns on ad revenue and continued audience growth?

DAY SIX | Physical Location

PRODUCT OFFERINGS

Product offerings will continue to include physical planning products and their complementary products along with merchandise such as shirts, mugs, and pins. The quarterly subscription box will also remain in rotation.

LEARNING OBJECTIVES

Focus on understanding location needs for a physical storefront which could also support warehousing and order fulfillment for online purchases.

Understand and document the processes involved with managing a physical location, including POS systems, in-person customer service, and facilities management.

Integrate in-person purchasing, employee management, and on-location inventory with the overall company ERP system.

MARKETING STRATEGY

Begin using influencer marketing to support the launch of the subscription box.

The marketing strategy will continue to utilize paid social media advertisements, influencer marketing, and social media content outlets to attract and nurture customers. The cadence and platforms used will remain flexible to accommodate business resources and new developments in the social media landscape.

With the physical store location, marketing will also include local advertising such as Groupon, billboards, and TV & newsletter ad spots.

ORGANIZATION

Additional headcount will be needed to support the expansion into a physical store location. This includes facilities maintenance personal and sales staff.

The ideal location will have enough stock room storage space to hold inventory for online sales. Because of this, order fulfillment personnel would also serve as store stocking personnel.

FINANCIAL INVESTMENT

Financial investment will shift to outfitting the store location, additional staffing, and any inventory investment needed to stock the store.

Additional advertising spend will be needed to support marketing for the physical store location.

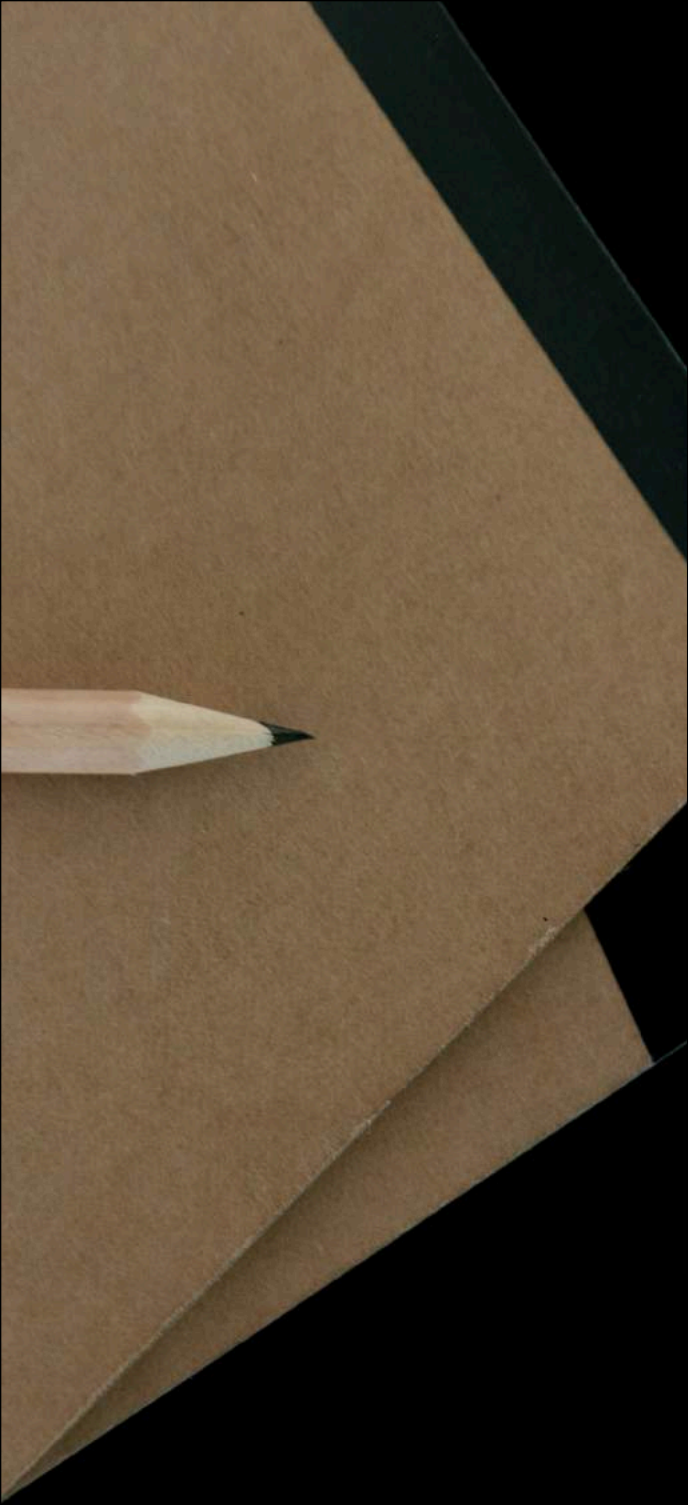
Efforts will continue to be made to secure funding through business grants, credit, and loans.

GOALS & MILESTONES

■ **ERP INTEGRATION** | Has the ERP system been updated to support the physical store location? Have SOPs and other business processes been updated?

■ **HUMAN RESOURCES** | Have you filled all open positions to support the physical store and order fulfillment?

■ **AUDIENCE & REVENUE GROWTH** | Are you continuing to see returns on ad revenue and continued audience growth?



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