



ANNUAL PLANNING WORKBOOK

workingwithdog.com



working *with* dog.



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GOAL #1 **REVENUE****Your business exists for one purpose: TO MAKE MONEY !**

So let's jump straight into the juicy stuff. Consult your PROFIT/LOSS STATEMENT and REVENUE BREAKDOWN for these questions.

How much REVENUE did you earn in the last 12 months? _____

Chances are, that revenue came into your business in a variety of ways.

LIST ALL THE WAYS YOUR BUSINESS GENERATED INCOME IN THE LAST 12 MONTHS

Consider products, product categories, clients, projects, events, affiliate or commission sales, licensing, B2B, B2C etc.

Example: 1:1 clients, group courses, consumer product sales, affiliate sales, wholesale bulk sales

INCOME GENERATOR	YEAR LAUNCHED	LAST 6 MTHS INCOME	PRIOR 6 MTHS INCOME	12 MTHS TOTAL INCOME
1) Consultations	2021	\$50,000	\$25,000	\$75,000
2)				
3)				
4)				
5)				



GOAL #1 **REVENUE**

LIST ALL THE WAYS YOUR BUSINESS SPENT INCOME IN THE LAST 12 MONTHS

EXPENSE	12 MTH TOTAL	DIVIDE 12 MTH TOTAL BY 12
1) Owner's Salary_____	_____	_____
2) Taxes_____	_____	_____
3) Book-Keeping_____	_____	_____
4) Marketing_____	_____	_____
5)_____	_____	_____
6)_____	_____	_____
7)_____	_____	_____
8)_____	_____	_____
9)_____	_____	_____
10)_____	_____	_____

HOW MUCH MONEY DID YOU MAKE IN THE LAST YEAR?

12 MTH TOTAL INCOME 12 MTH TOTAL EXPENSE 12 MTH OWNER'S SALARY

_____ - _____ + _____ =

TOTAL INCOME _____

TOTAL PROFIT (INCOME/REVENUE X 100)_____

FEELING OVERWHELMED? GET SOME HELP WITH ROADSIDE ASSISTANCE

[workingwithdog.com/roadmap-roadside-assistance-get-money/](https://www.workingwithdog.com/roadmap-roadside-assistance-get-money/)



GOAL #1 **REVENUE****NOW LET'S CREATE YOUR PLAN FOR THE NEXT 12 MONTHS!**

Look at your last 12 months of revenue and expenses. Do you have a goal you want to hit next year? If not, consider increasing total revenue or profit by a percentage (10% 30% 50% - whatever feels right for you).

What is your REVENUE goal for the next 12 months? _____

GREAT! Now let's break this down. What needs to happen BEFORE you can make your revenue goal come true?

- ☐ Increase total sales volume (^ revenue!!)
- ☐ Increase sales of high-margin offerings (^ profit!!)
- ☐ Create a new product or service (both/neither)*
- ☐ Stop offering a current product or service (both/neither)*
- ☐ Increase efficiencies in my business (^ profit!!)
- ☐ Fill my sales funnel (^ revenue + profit!!)

*If this is confusing be sure to check in with Jane's Office Hours!

LET'S PUT SOME TIMING TO THE ABOVE. PICK ONE ITEM FROM THE ABOVE TO FOCUS ON FOR EACH OF THE NEXT FOUR QUARTERS

Q1	Q2	Q3	Q4
Example:			
Fill sales funnel	Increase total sales volume	Increase efficiencies	Increase total sales volume
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

NICE! Now let's put some revenue number to it



GOAL #1 **REVENUE**

MTH 1-3: REVENUE TARGET _____ REVENUE FOCUS: _____

Quarter goal activities MTH 1 ACTIVITY: _____ DEADLINE: _____

MTH 2 ACTIVITY: _____ DEADLINE: _____

MTH 3 ACTIVITY: _____ DEADLINE: _____

MTH 4-6: REVENUE TARGET _____ REVENUE FOCUS: _____

Quarter goal activities MTH 4 ACTIVITY: _____ DEADLINE: _____

MTH 5 ACTIVITY: _____ DEADLINE: _____

MTH 6 ACTIVITY: _____ DEADLINE: _____

MTH 7-9: REVENUE TARGET _____ REVENUE FOCUS: _____

Quarter goal activities MTH 7 ACTIVITY: _____ DEADLINE: _____

MTH 8 ACTIVITY: _____ DEADLINE: _____

MTH 9 ACTIVITY: _____ DEADLINE: _____

MTH 10-12: REVENUE TARGET _____ REVENUE FOCUS: _____

Quarter goal activities MTH 10 ACTIVITY: _____ DEADLINE: _____

MTH 11 ACTIVITY: _____ DEADLINE: _____

MTH 12 ACTIVITY: _____ DEADLINE: _____

Bravo! Now go put those deadlines on your calendar





GOAL #2 **GROWTH**

In addition to revenue, there are probably a TON of areas in your brand and business where you might have potential to grow and evolve in the next 12 months including: Brand Clarity, Social Media, Email, Website, Time Spent at Work, Financial Freedom and Fear-busting to name a few!

Spend some time reviewing any analytics or notes that you have from last year. Identify some 'must do's' on your list that you're carrying into next year. Consider what you think will make the most noticeable difference in the metrics that matter to you, and then select a measureable growth goal - here are some ideas:

- + Brand Refresh (Brand Statement, brand pillars, logo/colors/fonts etc.)
- + Number of New Client Leads
- + Social Media Growth (pick one platform)
- + Email Subscriber growth
- + Web Refresh
- + Time Spent at Work
- + Profitability
- + Financial Freedom Goal (debt payoff, savings, investments, etc.)
- + Fear Busting
- + % of client conversions

What is your GROWTH goal for the next 12 months?

What needs to happen before this growth can be achieved?

Great! Now let's break your goal down into manageable milestones & set deadlines...





GOAL #2 **GROWTH**

Break down your list and assign NO MORE than one item per month. Make sure to include rewards to help you celebrate success!

MTH 1-3: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities

MTH 1 ACTIVITY: _____ DEADLINE: _____

MTH 2 ACTIVITY: _____ DEADLINE: _____

MTH 3 ACTIVITY: _____ DEADLINE: _____

MTH 4-6: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities

MTH 4 ACTIVITY: _____ DEADLINE: _____

MTH 5 ACTIVITY: _____ DEADLINE: _____

MTH 6 ACTIVITY: _____ DEADLINE: _____

MTH 7-9: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities

MTH 7 ACTIVITY: _____ DEADLINE: _____

MTH 8 ACTIVITY: _____ DEADLINE: _____

MTH 9 ACTIVITY: _____ DEADLINE: _____

MTH 10-12: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities

MTH 10 ACTIVITY: _____ DEADLINE: _____

MTH 11 ACTIVITY: _____ DEADLINE: _____

MTH 12 ACTIVITY: _____ DEADLINE: _____





GOAL #3 PERSONAL

Freedom & Fulfillment

Before we get into choosing concrete objectives - let's take a moment to design that dream life. A year from now, or five years from now if that feels more realistic...What is your dream scenario?

What does a DAY IN YOUR LIFE look like? Where are you living, what are your rituals, who do you share your days with? What is the calibre of colleague you are surrounded by, what is your workspace and lifespace like? What 'stuff' have you acquired or shed, and most importantly, how do you spend your TIME and how do you FEEL? Being an entrepreneur is supposed to be about having a 'lifestyle business' - so what lifestyle do you want to create? What does your unique brand of FREEDOM & FULFILLMENT LOOK, TASTE, SMELL AND FEEL LIKE? *(Take as many pages as you like, or move this brainstorm over to your journal - don't let paper be a limitation!)*





☆☆ GOAL #3 **PERSONAL**

The last goal to set is a personal one. This one might be the most important because it helps balance out your other two goals (so you don't spend your whole life working!) There may also be some cross-over between growth goals and personal ones – they might be both!

Spend some time reviewing your Freedom & Fulfillment dreaming from the previous page, or look at your dreamboard - think about the life you want to create, the person you want to be next year and select one measurable personal goal – here are some ideas:

- + Exercise
- + Mindfulness / Meditation / Gratitude
- + Life Balance / Sleep
- + Play / Hobbies / Happy
- + Health / Wellbeing
- + Relationships
- + Physical Environment
- + Adventure / Travel / Exploration
- + Education / Learning
- + Personal Money / Financial Freedom Goals

What is your PERSONAL goal for the next 12 months?

What needs to happen before this growth can be achieved?

Great! Now let's break your goal down into manageable milestones & set deadlines...





★ GOAL #3 **PERSONAL**

Break down your list and assign NO MORE than one item per month. Make sure to include rewards to help you celebrate success!

MTH 1-3: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities MTH 1 ACTIVITY: _____ DEADLINE: _____

MTH 2 ACTIVITY: _____ DEADLINE: _____

MTH 3 ACTIVITY: _____ DEADLINE: _____

MTH 4-6: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities MTH 4 ACTIVITY: _____ DEADLINE: _____

MTH 5 ACTIVITY: _____ DEADLINE: _____

MTH 6 ACTIVITY: _____ DEADLINE: _____

MTH 7-9: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities MTH 7 ACTIVITY: _____ DEADLINE: _____

MTH 8 ACTIVITY: _____ DEADLINE: _____

MTH 9 ACTIVITY: _____ DEADLINE: _____

MTH 10-12: REVENUE TARGET _____ **REVENUE FOCUS:** _____

Quarter goal activities MTH 10 ACTIVITY: _____ DEADLINE: _____

MTH 11 ACTIVITY: _____ DEADLINE: _____

MTH 12 ACTIVITY: _____ DEADLINE: _____





Congratulations! Your goals are now set. Let's put them all in one place to help you focus. (You may also want to print this out and keep it by your desk)

	REVENUE GOAL	GROWTH GOAL	PERSONAL GOAL
MTH 1-3			
MTH 4-6			
MTH 7-9			
MTH 10-12			





MARKETING PLANNING

In our experience, the primary hurdle between most Petpreneurs and kick-ass marketing is simply taking the time to make a plan. A marketing plan doesn't have to be a big, scary document - on the contrary - it is really just a commitment to do something on a particular day.

We'd like to invite you to commit to some deadlines (ideally 2x a month min.) for the distribution of three primary types of communication: Content (*blog, video, podcast*), Email, Social Media Posts.

BASIC CONTENT MARKETING STRATEGY LOOKS LIKE THIS:

PLAN CONTENT > PUBLISH CONTENT > SHARE VIA EMAIL > SHARE VIA SOCIAL

There are three primary platforms in this strategy:

1. Your website (with a blog)
2. An email list (on a platform like Mailchimp)
3. Social Media

IN ACTION, IT LOOKS A BIT LIKE THIS:

PUBLISH BLOG
Monday

>

SEND EMAIL
Tuesday

>

SHARE on SOCIAL
Wednesday

2 Blogs per month (24/yr)

2-4 Emails per month (24-48/yr)

2-7 Social Posts: Min. 2x week (*ideally 1 per day, 2 per month will be sharing the 'content'*)





CONTENT TOPICS

How to pick content topics and create effective content could be an entire planner on its OWN – but here's a few tips:

1. As far as your business is concerned, the only content worth creating is stuff that your target audience will value, and is one step in their journey to buy something from you. Great content topics are inspired by the overlap between what your audience is interested in and what your brand represents or sells.
2. Your Brand Pillars often make fantastic content categories.
3. Using Google Analytics keyword planner can be an excellent place to get ideas for content that your audience is searching for. One of the tricks is NOT to talk about your products or services constantly, but to tell stories around the EDGES of your brand.

When you do this, the key is to make sure that even if you're writing about a topic only loosely unrelated to a product you sell, you find a way to mention your business, and/or your expertise and link to your services or products.

For example, in a dog training business, your clients will all be hyper local, so you want to make sure that the topics you choose are specific enough to people who have dogs in your local area so that you will be appealing directly to your potential clients.

Want Help?

This is a HUGE topic that is difficult to teach in its entirety in a planner! Come on over to the Facebook Group during Office Hours and we'll answer all your questions!

MORE RESOURCES:

workingwithdog.com/multi-media-content/

workingwithdog.com/multi-media-content-long-tail-keywords/





WEBSITE TRACKER

Each month I will feature or talk about...hint...get topic ideas on Working With Dog and with our annual event and holiday calendar!

TOPIC 1	DATE	TOPIC 2	DATE
MTH 1			
MTH 2			
MTH 3			
MTH 4			
MTH 5			
MTH 6			
MTH 7			
MTH 8			
MTH 9			
MTH 10			
MTH 11			
MTH 12			





EMAIL TRACKER

Track your email stats as you go, but CHOOSE THE DATES for your 2x emails per month now, at the beginning of the year, then put the dates on your calendar!

	SUBSCRIBERS	EMAIL #1 DATE	#1 OPEN RATE	#1 CLICK RATE	EMAIL #2 DATE	#2 OPEN RATE	#2 CLICK RATE
MTH 1	_____	_____	_____	_____	_____	_____	_____
MTH 2	_____	_____	_____	_____	_____	_____	_____
MTH 3	_____	_____	_____	_____	_____	_____	_____
MTH 4	_____	_____	_____	_____	_____	_____	_____
MTH 5	_____	_____	_____	_____	_____	_____	_____
MTH 6	_____	_____	_____	_____	_____	_____	_____
MTH 7	_____	_____	_____	_____	_____	_____	_____
MTH 8	_____	_____	_____	_____	_____	_____	_____
MTH 9	_____	_____	_____	_____	_____	_____	_____
MTH 10	_____	_____	_____	_____	_____	_____	_____
MTH 11	_____	_____	_____	_____	_____	_____	_____
MTH 12	_____	_____	_____	_____	_____	_____	_____





SOCIAL MEDIA TRACKER

Track your email stats as you go, but CHOOSE THE DATES for your 2x emails per month now, at the beginning of the year, then put the dates on your calendar!

	TOPIC 1	TOPIC 2	TOPIC 3	TOPIC 4
MTH 1				
MTH 2				
MTH 3				
MTH 4				
MTH 5				
MTH 6				
MTH 7				
MTH 8				
MTH 9				
MTH 10				
MTH 11				
MTH 12				





SOCIAL MEDIA PLATFORM REVIEW

AVG. TIME SPENT PER DAY

PLATFORM PURPOSE & PRIMARY AUDIENCE



38 min.

Social Engine | Connect, Post, Poll, Chat & Catchup

Audience: 84% of users are between the ages of 30-49



28 min.

Visual Storytelling Engine | Build Brands & Relationships

Audience: 71% of users are between ages of 18 and 29



1 min.

News Engine | Get Fast News, Customer Service & Watch trends

Audience: 46% of users are between the ages of 18 and 29



>1 min..

Networking Engine | Connect with College Grads & Professionals

Audience: 44% of users are between 25 and 29



12 min.

Video Search Engine | Teach, Learn, Entertain & Be Entertained

Audience: 90% of users are between the ages of 18 and 44



14.2 min.

Visual Search Engine | Pin your Physical or Digital Products

Audience: 23% of users are between the ages of 25 and 34. Majority (59%) of users are female



EXPERT TIP

Use Facebook, but then pick just **ONE** other platform to really commit to!



SOCIAL MEDIA IMAGE SIZE GUIDE



Group Photo: 820x428px / **Page Cover:** 820x312px /
Ad Image Size: 1200x628px / **Profile Image:** 180x180px



Photo: 1080x1080px / **Profile Image:** 110x110px

*** I use a template that is 1200x1200, which translates well to Facebook too*



Header Photo: 1500x500px / **Profile Image:** 400x400px

*** Leave ample space at bottom left hand corner for profile picture and at the top and bottom to account for Twitter autocrop*



Personal Background: 1584x396px **Company Profile:** 1192x220px
Profile: 300x300px

*** LinkedIn allows larger photos so if it's fuzzy try a less compressed image*



Cover Photo: 2048x1152px

** YouTube cover images are cropped, so leave plenty of space around the edges*



Pin: 736x1104px / **Longer Pin:** 736x2061px / **Profile Image:** 165x165px

*** Use text or a title in your image (less than 20%) to increase clicks to content*



EXPERT TIP

Looking for gorgeous, affordable social templates? Try [CreativeMarket.com](https://www.creativemarket.com)



WORD FOR THE DAY:

DATE:



LONG TERM GOALS



1.



2.



3.

SHORT TERM GOALS

1.

this year

2.

this month

3.

this week

Today I will joyfully tick these important activities off my list!

☐ 1.

☐ 2.

☐ 3.

NOTES:

#MYDAILYTREATS



☐ **Thanks.** _____
How will you show gratitude today?

☐ **Reward.** _____
What will your reward be today?

☐ **Email** _____
Commit to checking it only 3x today?

☐ **Activity.** _____
How will you play or exercise today?

☐ **Time.** _____
When will your work day start & end?

☐ **Space.** _____
What will you do today to get headspace or 'me time'?

Breakfast

Lunch

Dinner

Snacks

Cross off the icon once you've posted, checked your messages, commented etc.

Cross off the icon for each glass of water you drink





We help petpreneurs

Find freedom & fulfilment by building brands instead of just businesses... We help make marketing easier, more effective and *gasp* maybe even fun...

We created Working with Dog, the Official Club for Petpreneurs, to be a safe, supportive space for you to do exactly that...

Meet Nic.



My name is Nichole, but you can call me Nic. I believe that entrepreneurs find freedom by building brands instead of just businesses – so I help petpreneurs build successful brands that support the life of their dreams. I have a Masters in Marketing and a decade of practical experience creating and growing pet brands, including 'Dog is Good' which I co-founded in 2007. As a graphic designer, commercial pet photographer, and marketing strategist I have had the opportunity to help solopreneurs and billion dollar brands alike launch, and grow. My book 'Million Dollar Dog Brand' is the essential guide for entrepreneurs who want to build a profitable, sustainable business in the pet industry.

Meet Jane.



Jane's been rocking it out in the pet industry for 16+ years, leading content strategy and marketing as Former Editor-in-Chief of Pet Health Network, Senior Producer at Petfinder.com, Founder of AdvoCats (and Dogs, Too!) and with many other leading pet brands like Animal Planet, Petco and more. As President of 'cause Digital Marketing and new co-owner of Working with Dog, she specializes in helping pet businesses large and small focus on achieving their marketing results, so they can focus on what matters--helping pet parents celebrate and take the best care of their pets.

We are here to help.

Together with our team, work hard to ensure **that we produce and share this kind of crazy valuable stuff in Working with Dog, the Official Club for Petpreneurs like you.** If you have specific topics, needs, questions or ideas for future Marketing Genius content - we'd love to hear it! Get in touch at: hello@workingwithdog.com

