

Business Planner

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Product Creation Planner

Purpose

A good product rarely comes together by accident.

Most successful digital products are built one small piece at a time. This planner helps you organise those pieces before you begin creating them.

The goal isn't to produce a complicated project plan. It's simply to give yourself a clear picture of what needs to be created, in what order, and what "finished" will look like.

Complete this planner before you begin serious production.

Section 1 — Product Overview

Product Name

Working Title (if different)

Product Format

- ☐ eBook
- ☐ Workbook
- ☐ Planner
- ☐ Checklist
- ☐ Template
- ☐ Spreadsheet
- ☐ Toolkit

☐ Printable

☐ Other

Who is this product for?

What problem does it solve?

What should the customer be able to do after completing it?

Section 2 — Define the Main Outcome

Complete the sentence.

When someone finishes using this product, they should be able to...

Now ask yourself:

- Is this outcome realistic?
- Is it specific?
- Would most customers understand it?
- Does every part of the product support this outcome?

Notes

Section 3 — Product Components

List every major component that will be included.

Component Essential? Planned? Completed?

☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐

Examples may include:

- Main guide
- Workbook
- Planner
- Calculator
- Templates
- Checklists
- Resource list
- Bonus guide

Only include items that genuinely help the customer.

Section 4 — Production Stages

Tick each stage once complete.

Stage	Complete
Finalise outline	☐
Draft content	☐
Create worksheets	☐
Create templates	☐

Stage	Complete
Review content	☐
Edit	☐
Format	☐
Test files	☐
Prepare delivery files	☐

Section 5 — What Must Be Created?

Think through every part of the product.

For each item ask:

"What exactly needs creating?"

Item Creation Tasks

Example

Workbook

- Draft introduction
- Create 10 worksheets
- Add writing space
- Review wording
- Export PDF

Section 6 — Potential Obstacles

Every project has challenges.

Thinking about them early usually makes them easier to manage.

Possible obstacles:

- ☐ Limited time
- ☐ Unsure about content
- ☐ Technical skills

- ☐ Design confidence
- ☐ Perfectionism
- ☐ Difficulty staying focused
- ☐ Unsure about pricing
- ☐ Other

How could I reduce these problems?

Section 7 — Resources Needed

List anything you will need before beginning.

Examples

- Photos
- Icons
- Brand colours
- Fonts
- Research
- Examples
- Spreadsheet formulas
- Printing tests

My resources

Section 8 — Success Checklist

Before moving into production ask yourself:

- ☐ I know who the customer is.
- ☐ I know the problem I'm solving.
- ☐ I know the main outcome.
- ☐ My outline feels complete.
- ☐ Every major component has a purpose.
- ☐ I understand the production stages.
- ☐ I know what needs creating first.
- ☐ My expectations are realistic.

Reflection

Which part of creating this product feels most straightforward?

Which part feels least certain?

What is the very first production task I can complete?

Weekly Production Schedule

Purpose

Many digital products take longer than expected—not because they are especially difficult to create, but because the work never finds a regular place in the week.

This planner helps you create a production routine that fits around your real life.

The goal is not to fill every hour. It is to make consistent progress.

Remember that a schedule should support you, not control you. It is perfectly normal to adjust it as your circumstances change.

Section 1 – Your Available Time

Before planning your week, think honestly about how much focused time you have available.

Approximate hours available this week:

- ☐ Less than 3 hours
- ☐ 3–5 hours
- ☐ 6–10 hours
- ☐ 11–15 hours
- ☐ More than 15 hours

When during the week do I usually have the best concentration?

- ☐ Early morning
- ☐ Mid-morning
- ☐ Afternoon
- ☐ Evening

☐ Late evening

☐ Weekends

Notes

What interruptions am I likely to have this week?

Section 2 – Weekly Priorities

This week's main objective:

Three tasks that matter most this week:

1.

2.

3.

Tasks that can wait until next week:

Section 3 – Weekly Schedule

Day	Time Available	Planned Task	Completed
Monday			☐
Tuesday			☐
Wednesday			☐
Thursday			☐
Friday			☐
Saturday			☐
Sunday			☐

Section 4 – Daily Focus

Rather than planning every detail, choose one meaningful task for each work session.

Today's production task

Estimated time

Actual time

Finished?

☐ Yes

☐ Partly

☐ No

If unfinished, what is the next small step?

(Copy this page for each work session.)

Section 5 – Protect Your Product Time

Sometimes the greatest challenge is not creating the product.

It is protecting enough uninterrupted time to work on it.

Think about what usually distracts you.

Tick anything that commonly interrupts your progress.

- ☐ Email
- ☐ Social media
- ☐ Phone notifications
- ☐ Household jobs
- ☐ Watching tutorials instead of creating
- ☐ Research that continues for too long
- ☐ Constant editing
- ☐ Starting new ideas before finishing existing ones
- ☐ Other

What will I do differently this week?

Section 6 – End of Week Reflection

Did I complete my most important tasks?

- ☐ Yes
- ☐ Mostly

☐ Not yet

What helped me make progress?

What slowed me down?

What should I change next week?

Weekly Progress Score

How satisfied am I with this week's progress?

☐ Excellent

☐ Good

☐ Fair

☐ Needs Improvement

Remember, consistent progress over several weeks is usually far more valuable than one short burst of intense activity followed by long periods of inactivity.

Bundle Pricing Planner

Purpose

Use this planner to combine related products into a useful bundle and choose a price that offers the customer a genuine advantage without removing too much profit.

A strong bundle should solve a broader problem or make the customer's task easier. It should not be a collection of unrelated files added only to make the offer look larger.

Part A: Bundle Purpose

Bundle name:

Who is it for?

What broader result will the bundle help them achieve?

Why is the bundle more useful than buying only the main product?

Part B: Products Included

Product or Resource	Standalone Price	Role in the Bundle	Essential or Bonus
1. _____	£/\$ _____	_____	Essential / Bonus
2. _____	£/\$ _____	_____	Essential / Bonus
3. _____	£/\$ _____	_____	Essential / Bonus
4. _____	£/\$ _____	_____	Essential / Bonus
5. _____	£/\$ _____	_____	Essential / Bonus

Product or Resource	Standalone Price	Role in the Bundle	Essential or Bonus
6. _____	£/\$ _____	_____	Essential / Bonus

Total standalone value:

£/\$ _____

Part C: Check Bundle Relevance

For each item, ask:

Does it help the same customer?

☐ Yes ☐ No

Does it support the bundle's main result?

☐ Yes ☐ No

Would the customer understand why it is included?

☐ Yes ☐ No

Does it remove a separate obstacle?

☐ Yes ☐ No

Would the bundle still be useful without it?

☐ Yes ☐ No

Products that receive several "No" answers may not belong in the bundle.

Part D: Bundle Price Options

Option 1: Small Saving

Standalone value:

£/\$ _____

Proposed saving:

_____ %

Bundle price:

£/\$ _____

Option 2: Moderate Saving

Standalone value:

£/\$ _____

Proposed saving:

_____ %

Bundle price:

£/\$ _____

Option 3: Stronger Incentive

Standalone value:

£/\$ _____

Proposed saving:

_____ %

Bundle price:

£/\$ _____

Part E: Profit Check

Price Option	Bundle Price	Estimated Per-Sale Costs	Estimated Profit
Small saving	£/\$ _____	£/\$ _____	£/\$ _____
Moderate saving	£/\$ _____	£/\$ _____	£/\$ _____
Stronger incentive	£/\$ _____	£/\$ _____	£/\$ _____

Lowest sustainable bundle price:

£/\$ _____

Preferred bundle price:

£/\$ _____

Part F: Customer Choice

Will customers be able to buy the products separately?

- ☐ Yes, every product
- ☐ Yes, selected products
- ☐ No, bundle only

Why does this approach make sense?

Will the bundle make the main product appear poor value on its own?

- ☐ Yes
- ☐ No
- ☐ Possibly

Does the price difference create a clear but reasonable reason to choose the bundle?

- ☐ Yes
- ☐ No
- ☐ Unsure

Part G: Bundle Presentation

Main product:

Supporting product 1:

How it helps:

Supporting product 2:

How it helps:

Supporting product 3:

How it helps:

One-sentence bundle description:

Final Bundle Decision

Final bundle price:

£/\$ _____

Customer saving compared with buying separately:

£/\$ _____

Percentage saving:

_____ %

Estimated profit per bundle sale:

£/\$ _____

Why is this bundle useful rather than merely larger?

Final Pricing Decision Page

Purpose

Use this page after completing the other pricing tools.

The aim is to bring together what you have learned about the customer, the product, the market, and the costs. Your final price should be based on the overall evidence rather than any single number.

Part A: Product Summary

Product name:

Customer:

Problem solved:

Main result:

Product position:

- ☐ Low-cost
- ☐ Standard
- ☐ Premium

Product depth:

- ☐ Focused
- ☐ Complete
- ☐ Comprehensive

Part B: Pricing Evidence

Typical competitor range:

£/\$ _____ to £/\$ _____

Price of the most comparable product:

£/\$ _____

My minimum sustainable price:

£/\$ _____

My preferred profit per sale:

£/\$ _____

My calculated break-even sales:

_____ sales

The price most likely to feel reasonable to the customer:

£/\$ _____

The price that best reflects the product's usefulness:

£/\$ _____

My preferred price before completing this page:

£/\$ _____

Part C: Three Final Options

Lower Option

Price:

£/\$ _____

Advantage:

Risk:

Main Option

Price:

£/\$ _____

Advantage:

Risk:

Higher Option

Price:

£/\$ _____

Advantage:

Risk:

Part D: Final Price

Regular selling price:

£/\$ _____

Why does this price make sense for the customer?

Why does this price make sense for the business?

What evidence supports it?

Part E: Introductory Price

Will the product have an introductory price?

☐ Yes

☐ No

Introductory price:

£/\$ _____

Regular price:

£/\$ _____

Introductory period begins:

Introductory period ends:

Reason for the introductory price:

What must happen before the price changes?

Part F: Additional Offers

Order bump:

Order bump price:

£/\$ _____

Why is it relevant to the main purchase?

Upsell:

Upsell price:

£/\$ _____

Why is it a natural next step?

Bundle:

Bundle price:

£/\$ _____

Part G: Pricing Confidence Check

Rate each statement from **1 to 5**.

1 = Not confident

5 = Very confident

Statement	Rating
I understand what comparable products cost	____ / 5
I understand my per-sale costs	____ / 5
The price reflects the product's usefulness	____ / 5
The intended customer can understand the value	____ / 5
The price fits the product's market position	____ / 5
The price leaves room for the business to grow	____ / 5
I can explain why I chose this price	____ / 5
I am not choosing the price only because of fear	____ / 5

Total confidence score:

____ / 40

Interpretation

8–18: Review needed

More research or cost calculation may be necessary.

19–29: Reasonable starting point

You have enough information to choose a price, although one or two areas may need further attention.

30–36: Strong decision

The price is supported by a good balance of customer, market, and business evidence.

37–40: Very well supported

You have a clear and considered reason for the price you have chosen.

Part H: Price Review Plan

Date the price will first be reviewed:

Suggested review point:

- ☐ After 30 days
- ☐ After 90 days
- ☐ After the first 25 sales
- ☐ After the first 50 sales
- ☐ After adding new resources
- ☐ Other: _____

Information I will review:

- ☐ Number of sales
- ☐ Conversion rate
- ☐ Customer feedback
- ☐ Refund rate
- ☐ Profit per sale
- ☐ Advertising cost
- ☐ Competitor prices
- ☐ Product improvements
- ☐ Questions from potential customers
- ☐ Other: _____

Reasons that may justify increasing the price:

Reasons that may justify reducing or restructuring the price:

Final Decision Statement

Complete the sentence in your own words.

I have chosen to price _____

at £/\$ _____ because _____

This price reflects the product's _____

It also allows the business to _____

I will review this decision on _____

using the following information:

Final Reminder

A price does not need to feel perfect before you use it.

It needs to be thoughtful, explainable, and sustainable.

You have considered what the customer receives, what comparable products cost, what the business must spend, and what level of positioning suits the offer. That is enough to make a responsible starting decision.

The market may later give you new information. When it does, you can review the price calmly and adjust it for clear reasons.

For now, choose the number that is best supported by the evidence in front of you, record why you chose it, and move forward.

Complete Email Sequence Planner

Purpose

Use this planner to organise the full email sequence before, during, and after the launch.

Each email should have one main job.

Part A: Sequence Overview

Product name:

Launch start date:

Launch end date:

Regular price:

Launch price, if any:

Offer deadline:

Target customer:

Main problem:

Main product result:

Part B: Before-Launch Emails

Email 1: Problem Awareness

Send date:

Main purpose:

Problem to introduce:

Useful insight:

Product mentioned?

☐ Yes

☐ No

Call to action:

Subject line:

Email 2: Educational or Context Email

Send date:

Main idea:

Why it matters:

Practical takeaway:

Product connection:

Subject line:

Part C: Launch Emails

Email 3: Product Announcement

Send date:

Main purpose:

Product description:

Key contents to mention:

1.

2.

3.

4.

Offer details:

Subject line:

Email 4: Educational Email

Send date:

Topic:

Practical insight:

Relevant product tool:

Call to action:

Subject line:

Email 5: Objection-Handling Email

Send date:

Objection:

Why it is reasonable:

Facts that answer it:

Product limitation to acknowledge:

Subject line:

Email 6: Frequently Asked Questions

Send date:

Questions to answer:

1.

2.

3.

4.

Subject line:

Email 7: Reminder

Send date:

New angle:

- ☐ Product preview
- ☐ Tool or feature
- ☐ Use case
- ☐ Common question
- ☐ Customer concern
- ☐ Other:

New information to add:

Subject line:

Email 8: Final-Day Email

Send date and time:

Exact deadline:

What changes after the deadline:

Main benefit to restate:

Final question to answer:

Subject line:

Part D: Buyer Emails

Email 9: Buyer Welcome

Send timing:

☐ Immediately after purchase

☐ Within: _____

Access link:

First file or first step:

Technical information:

Support contact:

Subject line:

Email 10: Product Use Follow-Up

Optional.

Send date:

What should the customer have done by now?

Helpful reminder or instruction:

Support invitation:

Email 11: Feedback Request

Send date:

Why this timing is suitable:

Questions to ask:

1.

2.

3.

4.

Subject line:

Email 12: Testimonial Request

Only send where appropriate.

Customer experience that supports the request:

Permission wording:

Identification options:

Subject line:

Part E: Non-Buyer Follow-Up

Email 13: Post-Launch Follow-Up

Send date:

Product status:

- ☐ Still available
- ☐ Available at regular price
- ☐ Closed
- ☐ Returning later

Question to ask:

Useful resource to share:

Subject line:

Part F: Sequence Schedule

Email	Purpose	Send Date	Audience	Main CTA	Status
Pre-launch 1					
Pre-launch 2					
Announcement					
Education					
Objection					
FAQ					
Reminder					
Final day					
Buyer welcome					
Feedback					
Testimonial					
Non-buyer					

Part G: Tone and Clarity Review

For each email, check:

- ☐ The email has one main purpose
- ☐ The subject line matches the content
- ☐ The opening is clear
- ☐ The reader's situation is recognised
- ☐ The product is described accurately
- ☐ The message avoids exaggerated promises
- ☐ The call to action is visible
- ☐ The tone does not sound apologetic
- ☐ The tone does not sound forceful
- ☐ Any urgency is genuine
- ☐ Prices and dates are correct
- ☐ All links work

Part H: Performance Record

Email	Open Rate	Click Rate	Replies	Sales	Unsubscribes	Notes

Part I: Sequence Review

Strongest Email

Email:

Why it may have worked:

What should be reused:

Weakest Email

Email:

Possible reason:

What should be changed:

Common Questions or Replies

1. _____
 2. _____
 3. _____
 4. _____
-

Improvements for the Next Launch

1. _____
2. _____
3. _____
4. _____

Final Sequence Statement

Complete this before writing the emails:

This sequence will help the reader understand _____ before introducing _____. It will answer questions about _____ and remind the reader by adding _____. Buyers will receive _____, while non-buyers will receive _____. After the launch, the sequence will be reviewed using _____.

Digital Product Business Planner

Purpose

Use this planner to keep your business moving in a clear direction. Instead of trying to remember dozens of ideas, record the important decisions in one place and review them regularly.

Business Vision

Business Name

Why did I start this business?

Who do I want to help?

What main problem do I solve?

My Ideal Customer

Age or life stage

Occupation or situation

Main challenge

Biggest goal

Questions they frequently ask

My Core Products

Product Status Price Purpose

Where Customers Find Me

Tick all that apply.

☐ Website

☐ Email List

☐ Pinterest

☐ Facebook

☐ Instagram

☐ LinkedIn

☐ YouTube

☐ Search Engines

☐ Etsy

☐ Marketplace

☐ Other

Business Priorities This Quarter

Priority 1

Priority 2

Priority 3

Things I Will Not Focus On Right Now

Notes

Product Improvement Planner

Purpose

Good products improve gradually. Use this planner to organise improvements instead of reacting to every individual suggestion.

Product Name

What Is Working Well?

Issues I Have Noticed

Evidence

Where did this information come from?

- ☐ Customer Feedback
- ☐ Refund Requests
- ☐ Support Emails
- ☐ Personal Review
- ☐ Sales Data

☐ Other

Planned Improvements

Improvement	Why It Matters	Priority	Completed
		High / Medium / Low	☐
			☐
			☐
			☐
			☐

Before I Make Changes

Answer these questions honestly.

Does this improve the customer experience?

☐ Yes ☐ No

Have several customers mentioned this?

☐ Yes ☐ No

Will this make the product easier to use?

☐ Yes ☐ No

Am I solving a genuine problem rather than adding more content?

☐ Yes ☐ No

Can this wait until my next scheduled review?

☐ Yes ☐ No

Review Notes

What did I improve?

What effect did those improvements have?

These worksheets are intentionally simple. They encourage consistent habits without overwhelming the reader, making them practical for beginners while remaining useful as the business grows.

90-Day Business Plan

Purpose

Ninety days is long enough to make meaningful progress but short enough to stay focused. Use this planner to decide what matters most over the next three months.

My Main Business Goal

Success Will Look Like

Quarter Priorities

Priority 1

Goal

Actions

- ---
- ---
- ---

Priority 2

Goal

Actions

- _____
- _____
- _____

Priority 3

Goal

Actions

- _____
- _____
- _____

Skills I Need to Improve

Potential Risks

Risk My Plan

End of Quarter Review

What worked well?

What surprised me?

What should I focus on next quarter?

Weekly Business Review

Purpose

A short weekly review helps you notice progress before small problems become larger ones.

Week Beginning

Wins This Week

Challenges

Business Numbers

Sales

Revenue

£_____

Email Subscribers

Content Published

Customer Questions

What Did I Learn?

Top Three Priorities for Next Week

1.

2.

3.

One Thing I Will Stop Doing

Monthly Planning Page

Purpose

Use this page at the beginning of every month to stay focused on the activities that matter most.

Month

My Main Goal

Business Priorities

Priority Completed

- ☐
- ☐
- ☐
- ☐
- ☐

Content Plan

Week	Main Topic	Completed
Week 1		☐
Week 2		☐
Week 3		☐
Week 4		☐

Promotion Plan

- ☐ Product Email
- ☐ Newsletter
- ☐ Blog Post
- ☐ Pinterest
- ☐ Social Media
- ☐ Collaboration
- ☐ Product Update
- ☐ Other

Important Dates

End of Month Reflection

What am I most pleased with?

What needs more attention next month?
