

Implementation Workbook

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Product Idea Brainstorm Sheet

Purpose of This Tool

Use this sheet to collect possible product ideas without judging them too quickly.

At this stage, the aim is not to choose the best idea. It is to notice problems, questions, tasks, and areas of knowledge that could become useful products.

Write freely. Some ideas may be incomplete. Others may become stronger when combined or narrowed later.

Part 1: Problems I Notice Around Me

What do people regularly struggle with?

What tasks seem to take people longer than they should?

What do people often delay because they do not know where to begin?

What mistakes do people make repeatedly?

What seems unnecessarily confusing?

Part 2: Questions I Hear Repeatedly

What questions do people ask me?

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

What questions appear repeatedly in groups, forums, comments, emails, or conversations?

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

Which question seems to cause the most uncertainty?

Why do people find it difficult?

Part 3: Tasks That Could Be Made Easier

What do people repeatedly need to:

- organise? _____
- calculate? _____
- plan? _____
- write? _____
- decide? _____
- remember? _____
- compare? _____
- track? _____
- prepare? _____
- complete? _____

Which of these tasks might benefit from a simple resource?

Part 4: Resources That Might Help

For each problem, consider what kind of product might make it easier.

Problem or Task	Possible Resource
	Guide
	Workbook
	Planner
	Checklist
	Template
	Spreadsheet
	Calculator
	Resource pack
	Mini-course
	Other: _____

Part 5: Product Idea Starters

Complete as many of these sentences as possible.

A guide that helps _____

A workbook for people who struggle with _____

A checklist that prevents _____

A planner that helps people organise _____

A template that saves time when _____

A spreadsheet that makes it easier to _____

A calculator that helps people decide _____

A resource pack for _____

A simple product that I wish had existed when _____

A product based on a process I already use for _____

Part 6: Initial Idea List

Write down every possible idea, even if it still feels rough.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Quick Reflection

Which ideas came from repeated problems rather than passing interests?

Which ideas feel easiest to explain?

Which ideas would be realistic to create?

Which ideas need more observation before they are developed?

Problem and Solution Worksheet

Purpose of This Tool

Use this worksheet to examine one possible product idea in more detail.

The goal is to separate the problem from the product. This helps you avoid creating a resource simply because the format appeals to you.

Complete one copy for each promising idea.

1. The Problem

What is the customer struggling with?

Describe the problem in one clear sentence.

When does this problem usually occur?

How often might it happen?

- Every day
- Every week
- Every month
- Occasionally
- During a particular event or stage
- Other: _____

2. The Person Experiencing the Problem

Who is most likely to experience this?

What situation are they in?

What might they already know?

What might still feel confusing or difficult?

3. The Effect of the Problem

What does the problem cost them?

Time

Money

Effort

Confidence

Missed opportunities

Other consequences

4. What They May Already Be Doing

How are people currently dealing with the problem?

Are they using:

- Notes
- Spreadsheets
- Free articles
- Videos
- Advice from friends
- Existing products
- Professional services
- Trial and error
- Nothing
- Other: _____

What appears weak, slow, confusing, or incomplete about the current approach?

5. The Desired Result

What would the person like to be easier?

What would they like to understand?

What would they like to complete?

What mistake would they like to avoid?

What decision would they like to make?

Write the desired result in one sentence.

6. The Possible Solution

What kind of product might help?

- Guide
- Workbook
- Planner
- Checklist
- Template pack
- Spreadsheet
- Calculator
- Resource library
- Mini-course
- Bundle
- Other: _____

What would the product help the customer do?

What would it not attempt to solve?

7. Problem-to-Solution Statement

Complete the sentence:

This product helps _____

who struggle with _____

to _____

by providing _____

8. Early Suitability Check

Does the problem seem:

Question	Yes	Unsure	No
Specific enough to explain clearly?	☐	☐	☐
Important enough to deserve attention?	☐	☐	☐
Repeated rather than isolated?	☐	☐	☐
Suitable for a digital product?	☐	☐	☐
Manageable for me to address?	☐	☐	☐
Narrow enough for a first product?	☐	☐	☐

9. Current Decision

- Keep exploring this idea
- Narrow the problem
- Change the intended customer
- Change the possible solution
- Gather more evidence
- Place the idea aside

Reason:

Skills, Knowledge, and Experience Inventory

Purpose of This Tool

Useful product ideas often grow from things you already know, understand, or do regularly.

This inventory helps you recognise those areas without assuming that every skill must become a product.

Include formal knowledge, work experience, practical ability, personal learning, hobbies, and systems you have developed for yourself.

Part 1: Work and Professional Experience

What jobs, roles, or responsibilities have you had?

Role or Area	Main Tasks	What I Learned
--------------	------------	----------------

What have colleagues or clients asked you to help with?		
What tasks do you perform confidently that beginners may find difficult?		
What systems, documents, or processes have you created at work?		

Part 2: Practical Skills

What can you do reliably?

Examples may include planning, budgeting, writing, organising, cooking, teaching, repairing, researching, designing, tracking, explaining, or managing.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Which skills save other people time?

Which skills help prevent mistakes?

Which skills are often harder for beginners than they appear?

Part 3: Knowledge Areas

What subjects do you understand well?

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

Which subjects have you studied formally?

Which subjects have you learned through experience?

Which subjects do people ask you about?

Which subjects could you explain simply to a beginner?

Part 4: Personal Experience

What problems have you solved in your own life?

What once felt difficult but now feels manageable?

What did you have to learn through trial and error?

What do you wish you had known earlier?

What routines, systems, or tools have you created for yourself?

Part 5: Repeated Resources

Have you created any of the following for your own use?

- Checklist
- Spreadsheet
- Planner
- Script
- Email template
- Budget
- Schedule
- Tracker
- Guide
- Process document
- Notes collection
- Other: _____

Which of these do you use repeatedly?

Which have you shared with others?

What feedback did you receive?

Part 6: Teaching and Explanation

What have you taught or explained more than once?

Which explanations seem to help people understand quickly?

What topics do people find easier after speaking with you?

Part 7: Interest and Motivation

Which subjects could you work on for several weeks without losing interest?

1.

2.

3.

4.

Which subjects do you enjoy but may not understand deeply enough yet?

Which subjects do you understand but do not want to build a product around?

Part 8: Responsible Boundaries

Are there topics where inaccurate guidance could cause harm?

Do any ideas require qualifications, legal advice, medical advice, or specialist expertise?

Which subjects are better suited to general educational material rather than personal recommendations?

What limits would need to be stated clearly?

Part 9: Possible Product Connections

Complete the table.

Skill, Knowledge, or Experience Problem It Could Help With Possible Product

Final Reflection

Which areas combine knowledge, usefulness, and genuine interest?

Which areas appear to solve repeated problems?

Which areas require more research before they could become products?

Which three areas seem most promising?

1.

2.

3.

Product Idea Shortlist

Purpose of This Tool

Use this sheet to organise your strongest ideas before moving into validation.

The aim is not to choose a final product yet. It is to create a manageable group of ideas that deserve further investigation.

Choose between five and ten ideas from your brainstorming work.

Shortlist Table

No. Intended Customer Problem Possible Product Desired Result

1
2
3
4
5
6
7
8
9
10

Quick Clarity Check

For each idea, give a simple rating from 1 to 5.

1 = weak or unclear

3 = partly clear

5 = strong and clear

Idea	Clear Problem	Specific Customer	Repeated Need	Achievable to Create	Personal Fit	Total
1						
2						
3						

Idea	Clear Problem	Specific Customer	Repeated Need	Achievable to Create	Personal Fit	Total
4						
5						
6						
7						
8						
9						
10						

Do not treat the score as proof that an idea will sell. It is only a way to identify where your thinking is clearest.

Idea 1: Closer Look

Working title:

Intended customer:

Problem:

Possible product:

Why this idea interests me:

What evidence have I noticed so far?

What still needs checking?

Idea 2: Closer Look

Working title:

Intended customer:

Problem:

Possible product:

Why this idea interests me:

What evidence have I noticed so far?

What still needs checking?

Idea 3: Closer Look

Working title:

Intended customer:

Problem:

Possible product:

Why this idea interests me:

What evidence have I noticed so far?

What still needs checking?

My Strongest Three Ideas

First

Reason:

Second

Reason:

Third

Reason:

Ideas to Keep for Later

These ideas may be useful, but they are not a priority now.

1.

2.

3.

4.

Ideas I Am Setting Aside

Idea Reason for Setting It Aside

Possible reasons may include:

- Too broad
- Unclear customer
- Weak problem
- Difficult to create
- Requires specialist knowledge
- Limited personal interest
- Better suited to a later product
- Needs more evidence

Final Shortlist Decision

The ideas I will take into Chapter 2 are:

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

Everyday Problem Observation Page

Purpose of This Tool

Product ideas are often found in ordinary moments.

Use this page to record questions, frustrations, delays, mistakes, and improvised solutions you notice during the week.

Do not try to decide immediately whether each observation could become a product. Record the pattern first. Interpretation can come later.

What to Notice

Pay attention when someone:

- asks the same question more than once
- says a task is confusing
- delays making a decision
- forgets an important step
- creates an awkward manual solution
- spends too long searching for information
- complains that a process is difficult
- uses several tools to complete one task
- worries about making a mistake
- wishes there were a simpler way

Daily Observation Log

Date What Happened? Who Experienced It? Problem or Frustration Current Solution

Repeated Questions

What questions did I hear or see this week?

1. _____
2. _____

3. _____
4. _____
5. _____

Which question appeared more than once?

Where did it appear?

- Work
- Home
- Social media
- Online group
- Customer email
- Conversation
- Review or comment
- Other: _____

Frustrations and Delays

What tasks did people avoid or postpone?

Why did they delay?

What part of the task seemed hardest?

Was the problem mainly:

- Lack of information
- Too many choices
- Poor organisation
- Fear of making a mistake
- Lack of time
- No clear process
- Repetitive work
- Other: _____

Improvised Solutions

What makeshift systems did I notice?

Examples may include loose notes, multiple spreadsheets, saved messages, screenshots, repeated copying and pasting, handwritten calculations, or files stored in several places.

Why might the current solution be inconvenient?

What type of resource might make it easier?

Mistakes and Missing Steps

What mistakes did people make repeatedly?

What did they forget?

What consequence followed?

Could a checklist, template, or guide help?

Language People Used

Record the exact or approximate phrases people used to describe the problem.

“I never know _____”

“I keep forgetting _____”

“It takes too long to _____”

“I wish there were _____”

“I am worried that _____”

“I do not understand _____”

Other phrase:

These phrases may later help you describe the problem in language that feels natural to the customer.

End-of-Week Pattern Review

Which problem appeared most often?

Which problem seemed most frustrating?

Which problem caused the greatest delay?

Which problem already has people looking for help?

Which observation surprised me?

Which possible product idea came from this week?

Possible Product Connections

Observed Problem **Person Affected** **Possible Resource** **Needs More Evidence?**

[]

[]

[]

[]

Observed Problem Person Affected Possible Resource Needs More Evidence?

[]

Final Reflection

What did I notice because I was paying closer attention?

Which problem appears ordinary but may still be worth solving?

What will I continue observing next week?

Competitor Review Worksheet

Purpose of This Tool

Use this worksheet to examine an existing product that addresses a similar problem.

The purpose is to learn about the market, the customer, and unmet needs. It is not to copy the product's wording, design, structure, exercises, or original ideas.

Complete a separate worksheet for each relevant product.

Product Details

Product name:

Creator or company:

Website or marketplace:

Product format:

- Ebook
- Workbook
- Planner
- Checklist
- Template
- Spreadsheet
- Calculator
- Course
- Membership
- Software or tool
- Bundle
- Other: _____

Price:

Date reviewed:

1. Intended Customer

Who does the product appear to be for?

How experienced is the intended customer?

- Complete beginner
- Early-stage user
- Intermediate user
- Experienced user
- Mixed audience
- Unclear

What situation or stage is the customer in?

Is the customer described clearly?

- Very clearly
- Somewhat clearly
- Broadly
- Not clearly

Notes:

2. Problem and Promise

What problem does the product claim to solve?

What result does it promise or suggest?

Is the result:

- Specific
- Understandable
- Realistic
- Broad
- Vague
- Overstated

How clearly is the value explained?

3. Product Contents

What appears to be included?

Which parts seem most useful?

Which parts appear unnecessary, unclear, or overly complicated?

Does the product appear easy to use?

- Yes
- Mostly
- Unsure
- No

Why?

4. Positioning and Presentation

How is the product presented?

- Simple and practical
- Detailed and comprehensive
- Premium
- Budget-friendly
- Beginner-focused
- Specialist
- Quick solution
- Ongoing system
- Other: _____

What words or phrases are used repeatedly?

What seems to be the main selling point?

What makes this product appear different from alternatives?

5. Positive Customer Feedback

What do customers praise?

Which positive comments appear more than once?

1. _____
2. _____
3. _____

What do these comments suggest customers value most?

Are customers mainly praising:

- Simplicity
- Depth
- Organisation
- Examples
- Templates
- Design
- Ease of use
- Time saved
- Clear instructions
- Customer support
- Other: _____

6. Negative Customer Feedback

What do customers dislike or find disappointing?

Which complaints appear repeatedly?

1. _____
2. _____
3. _____

Are customers asking for:

- Simpler instructions
- More detail
- More examples
- A printable version
- A digital version
- Better organisation
- More suitable pricing
- A beginner-friendly version
- A version for a particular audience
- Better support
- Other: _____

Which complaints seem like personal preference rather than a wider pattern?

7. Possible Market Gaps

Which customers may not be well served?

Which situations or needs appear to be overlooked?

Could the solution be made:

- Simpler
- More specific
- Easier to complete
- More practical
- Better organised
- More affordable
- More detailed
- Better suited to beginners
- Better suited to a specialist group
- Available in a different format

Explain:

8. Ethical Research Check

- I am studying customer needs, not copying content.
- I will not copy the product's wording.
- I will not reproduce its distinctive layout.
- I will not copy original exercises or frameworks.
- I will create my own structure and examples.
- I will respond to the problem in my own way.

What useful market lesson can I take without imitating the product?

9. Lessons for My Own Product Idea

What does this product confirm about demand?

What does it reveal about customer expectations?

What could I do differently for a clear and useful reason?

Does reviewing this product make my idea seem:

- Stronger
- Weaker
- More specific
- In need of adjustment
- Too similar
- Still unclear

Why?

Simple Interview Guide

Purpose of This Tool

Use this guide for short, informal conversations with people who genuinely experience the problem you are exploring.

The purpose is to understand their current experience. It is not to persuade them to approve your idea.

A useful conversation may last between ten and twenty minutes. Give the person room to explain things in their own words.

Before the Conversation

Person I plan to speak with

Why this person is relevant

What I hope to understand

Assumptions I should avoid presenting as facts

Simple Invitation

Adapt this wording naturally:

I am researching how people deal with _____. I would like to understand what is difficult, what people currently use, and what could be easier. Would you be willing to have a short conversation about your experience? I am not trying to sell you anything.

Notes or changes:

Opening the Conversation

Thank the person for their time.

Explain briefly that:

- there are no correct answers
- you are interested in their actual experience
- you may take notes
- they do not need to share anything private
- you are learning about the problem rather than testing them

Core Questions

You do not need to ask every question. Choose the ones that fit the conversation.

Understanding the Situation

What usually happens when you need to _____?

When did you last deal with this problem?

Can you talk me through what happened?

Which part was most difficult?

Understanding the Current Solution

How do you handle it now?

What tools, products, or advice do you use?

What works well about your current approach?

What does not work well?

Have you tried any other solutions?

Why did you stop using them?

Understanding the Cost of the Problem

How much time does this usually take?

Does it cause delays, mistakes, or extra work?

How does it affect you when it is not handled well?

How important is it for you to improve this?

Why?

Understanding Previous Spending

Have you ever paid for help with this problem?

What did you buy or use?

What made you choose it?

Was it worth the cost?

What was missing?

Understanding the Desired Result

What would make this easier?

What would a useful solution help you do?

What would you want to avoid?

What would a good result look like?

Optional Product Questions

Ask these only after you have explored the person's existing experience.

Which type of help would feel most practical?

- A short guide
- A step-by-step workbook
- A checklist

- A planner
- A template
- A spreadsheet
- A calculator
- Examples
- A combination of resources
- Other: _____

Would you prefer something:

- Short and simple
- Detailed and comprehensive
- Printable
- Editable on a computer
- Usable on a phone
- Completed in one sitting
- Used repeatedly over time

What would make a resource difficult or inconvenient to use?

Questions to Avoid

Avoid relying on questions such as:

- “Do you like my product idea?”
- “Would you definitely buy this?”
- “Do you think this is brilliant?”
- “Would everyone find this useful?”
- “Would you pay £50 for it?”
- “Do you agree that this is a major problem?”

These questions encourage prediction, politeness, or agreement.

A person’s actual behaviour usually provides more useful information.

Listening Notes

What exact phrases did the person use?

What seemed to frustrate them most?

What had they already tried?

What did they care about more than I expected?

What did they care about less than I expected?

What surprised me?

After the Conversation

Evidence supporting my idea

Evidence challenging my idea

New question raised

Possible adjustment to the idea

Strength of this conversation as evidence

- Weak
- Moderate
- Strong

Why?

Demand Evidence Scorecard

Purpose of This Tool

Use this scorecard to compare the strength of the evidence collected for a product idea.

The score is not a prediction of sales. It is a structured way to notice whether your confidence is based mainly on assumptions, general interest, or observable behaviour.

Score each area from **0 to 4**.

Rating Scale

0 — No evidence

You have not found evidence, or the evidence contradicts the idea.

1 — Weak evidence

One or two vague signs appear, but they may be isolated or based on opinion.

2 — Some evidence

Several signs appear, although important questions remain.

3 — Good evidence

Repeated patterns appear across more than one source.

4 — Strong evidence

People are actively seeking, comparing, spending, committing, or buying.

Scorecard

Evidence Area	Score 0–4 Notes and Examples
The problem can be described clearly	
A specific customer can be identified	
The problem appears repeatedly	
People actively search or ask for help	
People already spend time solving it	

Evidence Area	Score 0–4 Notes and Examples
People already spend money on solutions	
Existing products show visible demand	
Customers express dissatisfaction with current options	
Potential buyers describe urgency or meaningful frustration	
Informal conversations support the need	
People ask detailed follow-up questions	
People take small actions showing commitment	
The idea has a clear and responsible point of difference	
The problem suits a digital product	
The product appears manageable to create	

Total Score

_____ out of 60

Score Interpretation

0–15: Very Limited Evidence

The idea is still based mainly on assumptions or general interest.

Do not begin full product creation yet. Clarify the problem, speak to more relevant people, or compare the idea with another option.

16–29: Early but Unclear

There are some encouraging signs, but the idea needs more focus or evidence.

Look for repeated behaviour, stronger customer language, and evidence that people are already taking action.

30–44: Promising

The idea is supported by several useful demand signals.

Review weaker areas before proceeding. The product may need narrowing or adjustment, but there is a reasonable basis for further development.

45–60: Strong Early Evidence

The problem appears clear, active, and supported by meaningful behaviour.

This does not guarantee sales. It suggests the idea is grounded enough to move into deeper customer understanding and product planning.

Evidence Quality Review

A numerical total should not replace judgement.

Which areas received the strongest scores?

Which areas received the weakest scores?

Are any high scores based mainly on one source?

Did I find evidence across several different sources?

- Yes
- Partly
- No

Am I relying too heavily on compliments or hypothetical answers?

- Yes
- Possibly
- No

What is the strongest behavioural evidence?

What important evidence is still missing?

Confidence Check

Before research, how confident was I?

- Very low
- Low
- Moderate
- High
- Very high

After research, how confident am I?

- Very low
- Low
- Moderate
- High
- Very high

Why did my confidence change?

Comparison Table

Use this section when comparing several shortlisted ideas.

Product Idea	Score	Strongest Evidence	Main Concern	Current Decision
--------------	-------	--------------------	--------------	------------------

Which idea currently has the strongest evidence?

Which idea appears easiest to explain?

Which idea appears most manageable to create?

Proceed, Adjust, or Pause Decision Page

Purpose of This Tool

Use this page after completing your early validation work.

The goal is to make a visible decision based on the evidence you have gathered. The decision does not need to be permanent. It should be clear enough to guide your next action.

Product Idea Under Review

Working title:

Intended customer:

Problem:

Possible solution:

Demand Evidence Score:

_____ out of 60

What I Know

List the findings supported by repeated questions, searches, conversations, products, reviews, spending, or other observable behaviour.

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

What I Am Still Assuming

List beliefs that remain uncertain.

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

Strongest Evidence

What is the strongest sign that the problem is real?

What is the strongest sign that people want help?

What is the strongest sign that people may pay?

Main Concerns

What evidence suggests demand may be weak or unclear?

What part of the idea may be too broad?

What part may be difficult to create or deliver?

What important customer need may still be misunderstood?

Decision Options

Option 1: Proceed

Choose this when the problem is clear, repeated, and supported by several signs of active interest.

- The intended customer is identifiable.
- The problem is specific.
- People are already trying to solve it.
- Existing behaviour suggests genuine need.
- The product can address the problem responsibly.
- The scope feels manageable.
- I have enough evidence to continue.

Why I am proceeding

What I will carry into Chapter 3

My next action

Target completion date

Option 2: Adjust

Choose this when the problem appears valid but part of the proposed product needs changing.

What needs adjusting?

- Intended customer
- Problem statement
- Desired result
- Product format
- Level of detail
- Scope
- Language
- Positioning
- Other: _____

Original idea

Revised idea

Evidence supporting the adjustment

What I need to test next

Option 3: Narrow

Choose this when the broad idea shows weak interest but one specific part appears stronger.

Broad problem

Smaller problem showing stronger demand

Specific intended customer

Focused result

Revised product idea

Why the narrower version may be stronger

Option 4: Pause

Choose this when the evidence is incomplete or the timing is not suitable.

Why am I pausing?

- Not enough evidence
- Customer is still unclear
- Problem appears too weak
- More conversations are needed
- Current resources are limited
- Product requires knowledge I do not yet have
- Another idea is currently stronger
- Timing is unsuitable
- Other: _____

What would need to change before I reconsider?

What evidence would make the idea stronger?

Review date

Option 5: Replace

Choose this when the demand appears weak, the problem is unsuitable, or another idea has stronger evidence.

Why I am setting this idea aside

What did the research teach me?

Which idea will replace it?

Why does the replacement appear stronger?

My Final Decision

- Proceed
- Adjust
- Narrow
- Pause
- Replace

Complete the statement:

Based on the evidence I found, I have decided to _____
this idea because _____

Commitment to the Next Step

What is the next useful decision or action?

What can safely wait until later?

What will I avoid doing prematurely?

When will I review progress?

Closing Note to Myself

I do not need certainty before continuing. I need enough reliable evidence to make the next decision carefully.

The most important lesson from this validation process is:

Ideal Customer Profile

Purpose of This Tool

Use this profile to describe the primary person your product is being created for.

The aim is not to invent a detailed fictional character. Focus on the information that affects the problem, the product, and the buying decision.

Complete this profile using what you learned from reviews, conversations, customer questions, search behaviour, and your validation work.

Product Idea

Working product title:

Problem the product addresses:

Possible product format:

1. The Primary Customer

Who is this person in relation to the problem?

For example: a first-time freelancer, a new manager, a self-employed person with irregular income, or a beginner creating a first digital product.

What makes this person a suitable primary customer?

2. Their Current Situation

What are they currently trying to do?

What has made this problem important now?

What is happening in their work, business, household, or daily life?

Are they facing a deadline, decision, change, or repeated frustration?

3. What They Already Understand

What does the customer already know about the subject?

What basic information do they not need repeated?

What do they still find unclear?

Their current level of experience is:

- Completely new to the subject
- Aware of the basics
- Has tried a few things

- Has some experience but needs direction
- Experienced and looking to improve
- Other: _____

4. What They Have Already Tried

Which solutions have they used?

- Online searches
- Articles or blog posts
- Videos
- Free guides
- Books
- Templates
- Planners or workbooks
- Courses
- Professional advice
- Advice from friends or colleagues
- A homemade system
- Other: _____

What worked reasonably well?

What did not work?

What remains unresolved?

What may they now feel tired of hearing?

5. Their Main Frustration

What is the hardest part of the problem?

How does this difficulty appear in ordinary life?

What does it cost them?

- Time
- Money
- Confidence
- Energy
- Missed opportunities
- Delays
- Mistakes
- Stress
- Other: _____

Explain:

6. The Result They Want

What practical task do they want to complete?

What decision do they want to make?

What do they want to understand, organise, create, or improve?

What would count as a useful result?

7. Their Larger Hope

What broader improvement may this practical result support?

How might they feel after completing the immediate task?

- Clearer
- More confident
- Less overwhelmed
- More organised
- Better prepared
- Relieved
- More in control
- Other: _____

Remember that the product should promise the practical result, not control every wider outcome.

8. Their Main Concerns

What might stop this customer from buying?

- Price
- Lack of time
- Fear of complexity
- Doubt that the product suits their situation
- Concern that the information is too basic
- Concern that it will be too advanced
- Previous disappointment
- Uncertainty about whether they will use it
- Technical concerns
- Doubt about the result
- Preference for another format
- Other: _____

Which concern appears strongest?

Why?

9. Their Stage

The customer is mainly:

- Becoming aware of the problem
- Trying to understand the problem
- Looking for direction
- Comparing possible solutions
- Ready to take action
- Improving an existing approach
- Trying to maintain consistency

What is the next useful step for them?

What would be too advanced at this stage?

What would feel too basic?

10. Product Suitability

What type of help is likely to suit this customer?

- Explanation
- Roadmap
- Decision tool
- Checklist
- Workbook
- Template
- Planner
- Spreadsheet
- Calculator
- Examples
- Repeatable system
- Other: _____

What format would be easiest for them to use?

Why?

Primary Customer Description

Use your answers to write one grounded paragraph.

This product is for _____
who is currently _____.
They are trying to _____,
but they are struggling with _____.
They have already tried _____,
yet _____
remains unresolved. They want to _____
and may hesitate because _____.
They are currently at the stage where _____.
_____.

Revised natural version

Rewrite the description in your own words:

Primary, Secondary, and Unsuitable Customers

Primary customer

Possible secondary customer

This product is not designed for

Why not?

Current Situation Worksheet

Purpose of This Tool

Use this worksheet to understand what is happening when the customer begins looking for help.

A customer's present situation often matters more than broad demographic details. It tells you why the problem feels important and what kind of help is appropriate.

Customer and Product

Customer group:

Product idea:

Problem being explored:

1. What Is Happening Now?

What is the customer currently trying to complete, decide, organise, improve, or understand?

What does an ordinary day involving this problem look like?

Where does the difficulty usually appear?

- At work
- In the business
- At home

- During planning
- While making a decision
- When using a current system
- During a repeated task
- Other: _____

Describe the situation:

2. Why Has the Problem Become Important Now?

Has something recently changed?

- They have started something new
- They are facing a deadline
- Their responsibilities have increased
- Their current system has failed
- They have made a mistake
- They have lost time or money
- They have become tired of guessing
- They need to make an important decision
- They have received new information
- Another person has raised the issue
- Other: _____

What has happened?

Why are they looking for help now rather than earlier?

3. Pressure and Limitations

What pressures affect the customer?

- Limited time
- Limited money
- Limited knowledge
- Lack of confidence
- An approaching deadline
- Too many choices

- Fear of making a mistake
- Changing circumstances
- Lack of support
- Technical difficulty
- Other: _____

Which pressure matters most?

How does it affect what the product should provide?

4. What They Are Doing Now

How are they currently managing the problem?

What parts of their current approach work?

What parts create difficulty?

Are they using an improvised solution?

- Yes
- No
- Unsure

Describe it:

5. What They Already Know

What does the customer already understand?

What do they believe they understand but may have misunderstood?

What do they still need explained?

6. What Has Already Been Tried?

List the customer's previous attempts.

Previous Attempt	What Helped	What Did Not Help	What Remains Unresolved
------------------	-------------	-------------------	-------------------------

What pattern appears across these attempts?

7. The Immediate Need

What does the customer need help with first?

What could safely wait until later?

What would be too much information right now?

Current Situation Summary

Complete the statement:

The customer is currently _____.

The problem has become important because _____

_____.

They are currently using _____,

but this does not fully work because _____

_____.

Their most immediate need is _____.

Natural summary

Desired Result Worksheet

Purpose of This Tool

Use this worksheet to turn a broad customer wish into a practical result your product can reasonably support.

A strong result is specific enough to guide the product without making promises beyond its control.

Product and Customer

Product idea:

Primary customer:

Problem:

1. The Customer's Broad Wish

What does the customer say they want?

Examples might include becoming more organised, earning more, saving time, feeling more confident, or improving a business.

Why does this matter to them?

2. The Immediate Practical Result

What should the customer be able to do after using the product?

- Understand something
- Make a decision
- Complete a task
- Create something
- Organise information
- Plan a process
- Compare options
- Improve an existing system
- Repeat a task more easily
- Other: _____

Describe the result clearly:

3. Make the Result Specific

What exactly will be completed?

What will be clearer?

What will become easier?

What will the customer have in their hands at the end?

Examples:

- a completed plan
- a chosen product idea
- an organised spreadsheet
- a finished checklist
- a prepared client quote
- a clear decision
- a reusable system

4. Define the Starting Point

Before using the product, the customer is:

They currently feel or experience:

They are unable to:

5. Define the Finishing Point

After using the product successfully, the customer will have:

They will understand:

They will be able to:

6. From and To Statement

Complete the sentence:

This product helps the customer move from _____

to _____.

Rewrite it naturally:

7. Is the Result Realistic?

- The result is within the product's control.
- The customer can recognise when it has been achieved.
- The result is suitable for the customer's current stage.
- The result does not depend entirely on luck or outside circumstances.
- The product does not promise an entire life or business outcome.
- The result is meaningful enough to matter.
- The scope is manageable.

Which part of the result may be too broad?

How could it be narrowed?

8. The Emotional Benefit

How may the customer feel after achieving the practical result?

- Less confused
- More prepared
- More confident
- Relieved
- More organised
- Less overwhelmed
- More in control
- Able to move forward
- Other: _____

Why might this feeling follow naturally?

9. What the Product Cannot Promise

What lies outside the product's control?

What wider result should not be guaranteed?

What responsibility remains with the customer?

Final Result Statement

This product helps _____
to _____
by _____,
so they can _____.

Refined version

Customer Frustration and Objection Map

Purpose of This Tool

Use this map to understand both the difficulty that makes the customer seek help and the concerns that may stop them from buying.

Frustrations explain why the product matters. Objections explain why a useful product may still feel unsuitable, risky, or difficult.

The goal is not to pressure the customer. It is to design and explain the product more responsibly.

Product Idea

Primary Customer

Part 1: The Main Frustration

What is the customer struggling with?

What part causes the most difficulty?

When does the frustration usually appear?

How often does it occur?

- Daily

- Weekly
- Monthly
- Occasionally
- During a particular event or stage
- Unsure

Part 2: The Practical Consequences

Does the problem cause:

- Delays
- Mistakes
- Wasted time
- Wasted money
- Repeated work
- Missed opportunities
- Poor organisation
- Difficulty making decisions
- Incomplete tasks
- Other: _____

Describe the practical effect:

Part 3: The Emotional Effect

How may the customer feel?

- Confused
- Frustrated
- Uncertain
- Overwhelmed
- Embarrassed
- Disappointed
- Tired
- Sceptical
- Worried
- Other: _____

What appears to create this feeling?

Avoid exaggeration. Use only feelings supported by evidence or ordinary observation.

Part 4: Previous Disappointments

What has the customer already tried?

What disappointed them?

What may they now be doubtful about?

Which claims or phrases may make them sceptical?

Part 5: Buying Objections

Price

What might they think about the price?

What would help the price feel understandable?

Time

Do they worry that the product will take too long to use?

How could the product reduce this concern?

Complexity

What may feel difficult, technical, or overwhelming?

Could the product include:

- A quick-start page
- Clear instructions
- Worked examples
- A simpler version
- Fewer steps
- A glossary
- Other: _____

Relevance

Why might the customer wonder whether the product suits them?

How can the intended customer and boundaries be made clearer?

Trust

What might make the customer cautious?

What honest information could help?

Previous Purchases

What may they fear repeating?

How can this product be meaningfully different?

Usefulness

Why might they worry that they will not use the product?

How could the product support practical use?

Format

What format concerns may appear?

- Difficult to print
- Difficult to edit
- Difficult to use on a phone
- Requires unfamiliar software
- Too many separate files
- Too long
- Too little detail
- Other: _____

How could the delivery be improved?

Part 6: Objection Response Map

**Customer
Concern**

**Why It Is
Reasonable**

**Product Design
Response**

**Clear Explanation
Needed**

Part 7: Product Changes Suggested by This Map

What should be simplified?

What should be explained more clearly?

What should be demonstrated with an example?

What should be removed?

What boundary should be stated honestly?

Frustration and Objection Summary

Main frustration

Practical consequence

Strongest emotional concern

Main reason for hesitation

Most useful product response

Customer Language Notes Page

Purpose of This Tool

Use this page to record the words customers naturally use when describing their problem, previous attempts, desired result, and concerns.

Customer language can help you explain the product clearly. It should not be copied carelessly or used to manipulate people. Look for repeated phrases and ordinary wording that reflects genuine experience.

Product Idea

Customer Group

Research Period

From _____ to _____

1. Problem Language

How do customers describe the problem?

“I struggle with _____”

“I do not know how to _____”

“I keep having trouble with _____”

“The hardest part is _____”

“I never seem to _____”

“It takes too long to _____”

Other phrases:

2. Situation Language

What do customers say about their current circumstances?

“I have just started _____”

“I need to do this before _____”

“At the moment, I am _____”

“Since _____, I have found...”

“I am trying to _____”

Other phrases:

3. Previous Attempt Language

What do they say about what they have tried?

“I have already tried _____”

“I downloaded _____”

“I bought _____”

“I watched or read _____”

“The problem with that was _____”

“It worked until _____”

“I stopped using it because _____”

Other phrases:

4. Desired Result Language

What do customers say they want?

“I need a way to _____”

“I want something that _____”

“I would like to be able to _____”

“I just want to know _____”

“It would help if I could _____”

“I need this to be _____”

Other phrases:

5. Frustration Language

Record phrases showing practical or emotional difficulty.

“This is confusing because _____”

“I am tired of _____”

“I keep getting stuck at _____”

“I worry that _____”

“I feel overwhelmed by _____”

“I do not have time to _____”

Other phrases:

6. Objection Language

What do customers say when considering a solution?

“I am not sure this is for me because _____”

“I do not want another _____”

“I am worried it will be _____”

“I have bought things like this before and _____”

“I would need to know _____”

“I do not have enough _____”

Other phrases:

7. Words Customers Use Repeatedly

Word or Phrase Where It Appeared Number of Times What It May Reveal

8. Creator Language Versus Customer Language

Formal or Creator-Led Phrase Clearer Customer Phrase

Example:

Creator-led: “Improve workflow efficiency.”

Customer-led: “Keep everything in one place so I stop forgetting tasks.”

9. Language to Avoid

Which words feel exaggerated, vague, technical, or unsuitable?

Which phrases may create distrust?

Which terms need a simple explanation?

10. Language Summary

The clearest description of the problem

The most natural description of the desired result

The strongest phrase showing frustration

The most common concern

Useful wording to carry into the product

One-Sentence Audience Statement Builder

Purpose of This Tool

Use this builder to write a short, clear description of who the product is for.

The statement should help a suitable customer recognise themselves. It should also guide your decisions about content, examples, format, and scope.

A useful statement usually includes:

- who the customer is
- their present situation
- the problem they face
- the result they want

It does not need to include every detail.

Step 1: Name the Customer

Who is the product mainly for?

Avoid descriptions such as:

- everyone
- anybody who needs help
- all business owners
- people who want success

Choose a recognisable person in relation to the problem.

Examples:

- first-time freelancers
- self-employed people with irregular income
- new digital product creators
- parents planning meals around shift work
- first-time managers

My primary customer is:

Step 2: Describe Their Current Situation

What are they currently trying to do?

What stage are they at?

- Becoming aware
- Looking for direction
- Making a decision
- Taking action
- Improving
- Maintaining

Situation phrase:

Step 3: Name the Main Problem

What is making the task difficult?

Keep the problem specific.

Broad:

They want to improve their business.

Clearer:

They have several product ideas but do not know which one is worth developing.

My customer is struggling with:

Step 4: Name the Practical Result

What do they want to understand, decide, organise, create, or complete?

The result should be realistic and visible.

My customer wants to:

Step 5: Choose a Statement Structure

Structure A: Simple Audience Statement

This product is for **[customer]** who is **[current situation]** and needs help to **[practical result]**.

Draft:

Structure B: Problem-Focused Statement

This product is for **[customer]** who is struggling with **[specific problem]** and wants to **[practical result]**.

Draft:

Structure C: Stage-Focused Statement

This product is for **[customer]** who has already **[previous attempt or knowledge]** but still needs help to **[practical result]**.

Draft:

Structure D: From-and-To Statement

This product helps **[customer]** move from **[current difficulty]** to **[practical result]**.

Draft:

Step 6: Review the Statement

Can a suitable customer recognise themselves?

- Yes
- Partly
- No

Is the problem specific?

- Yes
- Partly
- No

Is the result practical?

- Yes
- Partly
- No

Does every detail affect the product?

- Yes
- Mostly
- No

Does the statement avoid exaggerated promises?

- Yes
- No

Is it short enough to understand quickly?

- Yes
- No

Step 7: Remove Unnecessary Details

Cross out anything that does not affect:

- the problem

- the product
- the format
- the examples
- the buying decision

What can be removed?

Step 8: Make It Sound Natural

Read the sentence aloud.

Does it sound like something you would say to another person?

- Yes
- Not yet

Which words feel stiff, technical, or vague?

Simpler alternatives:

Final Audience Statement

Expanded Customer Description

Use the sentence as the opening for a short paragraph:

This product is for _____
_____.

They are currently:

They have already tried:

They want to:

They may hesitate because:

Examples

Example 1

This product is for first-time freelancers who understand the service they want to offer but need a practical way to price and quote their first client projects.

Example 2

This product is for self-employed people with irregular income who want to organise monthly earnings, essential spending, and available money in one clear place.

Example 3

This product helps new digital product creators move from having several untested ideas to choosing one focused idea supported by evidence.

Example 4

This product is for people who have tried traditional weekly planners but need a more flexible system that works around changing shifts.

Final Decision Check

Does this audience statement give me enough clarity to decide:

- What the product should include
- What it should leave out
- Which examples to use
- How much explanation is needed
- What format may suit the customer
- Which concerns should be addressed
- What stage the product should serve

The most important product decision this statement clarifies is:



Digital Product Format Selector

Purpose of This Tool

Use this tool to choose the format that best matches what the customer needs to do.

Do not begin by asking which format looks most impressive or could support the highest price. Begin with the customer's task.

The right format should make the result easier to reach.

Product Idea

Working product title:

Primary customer:

Problem being addressed:

Practical result:

1. What Does the Customer Mainly Need to Do?

Choose the main action.

- Understand a subject
- Make a decision
- Organise information
- Complete a task
- Create a document or asset
- Calculate or compare numbers

- Follow a process
- Remember important steps
- Plan work over time
- Practise a skill
- Improve an existing system
- Repeat a task more easily
- Other: _____

Describe the customer's main task in one sentence:

2. How Will the Customer Use the Product?

Will they use it:

- Once
- Occasionally
- Weekly
- Monthly
- During a particular event
- As a regular reference
- As part of an ongoing routine
- Unsure

Where are they most likely to use it?

- On a computer
- On a phone
- On a tablet
- Printed on paper
- At a desk
- While working
- While travelling
- In a meeting
- Other: _____

What practical limitations should be considered?

- Limited time
- Limited technical confidence
- Limited attention
- Limited access to software
- Needs to print easily
- Needs to edit the product
- Needs to use it repeatedly
- Needs simple instructions

- Other: _____

Explain:

3. Format Review

Guide or Ebook

Best suited when the customer mainly needs:

- explanation
- understanding
- context
- a clear sequence of ideas
- reference information

Would a guide suit this product?

- Yes
- Possibly
- No

Why?

What would the guide need to help the customer do, rather than simply read?

Workbook

Best suited when the customer needs to:

- reflect
- compare options
- make decisions
- record information
- apply ideas to their own situation

Would a workbook suit this product?

- Yes
- Possibly
- No

Why?

What decisions or exercises would it contain?

Checklist

Best suited when the customer:

- understands the process
- needs to remember steps
- wants to avoid omissions
- needs a quick reference

Would a checklist suit this product?

- Yes
- Possibly
- No

Why?

Does the customer already understand the steps well enough to use one?

Template

Best suited when the customer needs:

- a structure to adapt
- help beginning a task
- a repeatable document
- a practical example of what to include

Would a template suit this product?

- Yes
- Possibly
- No

What would the template help the customer create?

What instructions would be needed?

Spreadsheet or Calculator

Best suited when the customer needs to:

- organise numbers
- compare options
- perform repeated calculations
- track changes
- reduce manual work

Would a spreadsheet or calculator suit this product?

- Yes
- Possibly
- No

What would it calculate, compare, or organise?

Would the customer need a simple guide or worked example?

Planner

Best suited when the result depends on:

- actions over several days or weeks
- regular scheduling
- repeated habits

- deadlines or milestones
- reviewing progress

Would a planner suit this product?

- Yes
- Possibly
- No

What period would it cover?

What would the customer plan or review?

Toolkit

Best suited when several connected resources support one result.

Would a toolkit suit this product?

- Yes
- Possibly
- No

What is the one connected result?

Which resources would genuinely support that result?

Do any planned resources belong to a different problem or stage?

Recorded Workshop or Lesson

Best suited when the customer benefits from:

- seeing a process demonstrated
- hearing an explanation
- learning in stages
- watching something being completed

Would recorded teaching suit this product?

- Yes
- Possibly
- No

What would be easier to demonstrate than explain in writing?

Could the same result be achieved more simply through another format?

4. Format Combination

Does the product need more than one format?

- No, one format is enough
- Yes, a main format plus one support format
- Yes, a small set of connected formats
- Unsure

Main format

Its job is to:

Support format

Its job is to:

Additional format, if genuinely necessary

Its job is to:

5. Friction Check

Could the chosen format create any difficulty?

- Too much reading
- Too much writing
- Too many files
- Unfamiliar software
- Difficult printing
- Difficult editing
- Too much time required
- Too little explanation
- Too much explanation
- Hard to use on a phone
- Other: _____

How could this difficulty be reduced?

Final Format Decision

Chosen format:

Reason:

How this format helps the customer reach the result:

What will not be included:

Product Scope Planner

Purpose of This Tool

Use this planner to define what the product will cover and where it will stop.

A clear scope protects the customer from unnecessary information and protects the creator from an endless project.

The aim is not to make the product small. It is to make it complete for one specific result.

Product Overview

Working product title:

Primary customer:

Main problem:

Main product format:

1. The Product's Main Job

Complete the sentence:

The main job of this product is to help the customer...

Can the main job be understood quickly?

- Yes

- Partly
- No

Does it describe one main result?

- Yes
- Mostly
- No

If the product appears to have several jobs, list them:

1. _____
2. _____
3. _____

Which one should be the primary job?

Which jobs may belong in later products?

2. Customer Starting Point

Before using the product, the customer:

Already understands:

Has already tried:

Already has:

Still struggles with:

Is currently trying to:

3. Customer Finishing Point

After using the product successfully, the customer will:

Understand:

Decide:

Complete:

Create or organise:

Know what to do next:

4. The Gap the Product Must Bridge

What is missing between the starting point and finishing point?

What does the customer need to learn?

What decisions must they make?

What actions must they take?

What mistakes should the product help them avoid?

5. Scope Boundaries

The product will include

The product will not include

The product will assume that the customer already knows

The product will not assume that the customer knows

6. Stage of the Customer's Problem

The product is designed mainly for someone who is:

- Becoming aware of the problem
- Trying to understand it
- Looking for direction
- Comparing options
- Ready to act
- Improving an existing approach
- Maintaining a system

What would be too early for this customer?

What would be too advanced?

What belongs after this product?

7. Size and Complexity

What is the smallest complete version of this product?

How many main sections or components are likely to be needed?

What could make the product unnecessarily large?

What could make it too thin to be useful?

8. Version One Boundary

Version one must contain:

Version one may contain:

Version one will not contain:

Possible version two ideas:

Possible separate product ideas:

9. Scope Warning Signs

Check any warning signs that apply.

- The product serves several very different customers.
- It addresses several unrelated problems.
- It covers beginner and advanced stages equally.
- The main result is difficult to explain.
- Every new section creates another section.
- The product keeps growing without a clear reason.
- Bonuses are being added to make the product look larger.
- The product depends on too many formats or files.
- The finishing point is outside the product's control.
- The product has no clear stopping point.
- Other: _____

What needs to change?

Final Scope Statement

This product is designed to help _____
move from _____
to _____
by providing _____.
It will cover _____
but will not cover _____.

Natural version

Core Content and Bonus Content Worksheet

Purpose of This Tool

Use this worksheet to separate what the customer needs from what may merely make the product look larger.

Core content supports the promised result directly.

Support materials make that process easier, clearer, faster, or more accurate.

Unnecessary extras may be interesting, but they weaken focus or belong elsewhere.

Product Overview

Product title:

Main result:

Primary customer:

1. List Every Possible Content Idea

Write freely before sorting.

Possible Content, Tool, or Resource Why It Might Be Useful

2. Core Content Test

For each idea, ask:

1. Does the customer need this to reach the promised result?
2. Would removing it leave an important gap?
3. Does it suit the customer's current stage?
4. Does it support the product's main job?

Mark each item:

- **C** — Core content
- **S** — Support material
- **L** — Later product or version
- **R** — Remove

Content Idea C S L R Reason

3. Core Content

List the parts without which the customer cannot reasonably reach the result.

Core section or component 1

Why it is essential:

Core section or component 2

Why it is essential:

Core section or component 3

Why it is essential:

Core section or component 4

Why it is essential:

Core section or component 5

Why it is essential:

4. Support Materials

Support materials should remove a clear difficulty.

Support item 1

What difficulty does it remove?

Does it make the process:

- Easier
- Clearer
- Faster
- More accurate
- More repeatable
- Less intimidating

Support item 2

What difficulty does it remove?

Does it make the process:

- Easier
- Clearer
- Faster

- More accurate
- More repeatable
- Less intimidating

Support item 3

What difficulty does it remove?

Does it make the process:

- Easier
- Clearer
- Faster
- More accurate
- More repeatable
- Less intimidating

5. Bonus Content Review

List any planned bonus.

Planned Bonus How It Supports the Main Result What Happens If It Is Removed?

For each bonus, ask:

- Does it solve the same problem?
- Does it serve the same customer?
- Does it match the customer's current stage?
- Does it make the core product easier to use?
- Is it being added mainly to increase the file count?
- Would it be clearer as a separate product?

Bonuses that remain:

Bonuses to remove:

Bonuses to save for later:

6. Content Overlap Check

Does any content repeat information already included?

Could two sections be combined?

Is any support material repeating the core product without making action easier?

Is any bonus more interesting than useful?

7. Customer Effort Check

How much must the customer:

Read:

Write:

Calculate:

Download or open:

Learn before beginning:

Could this effort be reduced without weakening the result?

Final Content Decision

Core product contains

Support materials contain

Bonuses contain

Saved for later

Removed

Product Outcome Statement Builder

Purpose of This Tool

Use this builder to write a clear statement describing what the product is designed to help the customer achieve.

The outcome should be practical, visible, and believable.

It should not guarantee results controlled by the market, other people, or circumstances outside the product.

Product and Customer

Product format:

Primary customer:

Main problem:

1. Describe the Starting Point

Before using the product, the customer is:

They currently have:

They do not yet have:

They are struggling to:

2. Describe the Finishing Point

After using the product successfully, the customer will have:

They will be able to:

They will understand:

They will have completed:

3. Choose the Main Outcome Type

The product mainly helps the customer to:

- Understand
- Choose
- Plan
- Create
- Organise
- Calculate
- Compare
- Prepare
- Improve
- Repeat
- Other: _____

Write the practical outcome:

4. Make the Outcome Specific

What exactly will exist at the end?

How will the customer know the task is complete?

What part of the larger problem will remain outside the product?

What result depends on the customer's later action?

5. Remove Exaggeration

Check whether the draft relies on words such as:

- complete success
- guaranteed
- perfect
- effortless
- instant
- total freedom
- life-changing
- unlimited
- foolproof
- never fail

Words or claims to remove:

More accurate wording:

6. Choose a Statement Structure

Structure A: Customer and Result

This product helps **[customer]** to **[practical result]**.

Draft:

Structure B: Customer, Result, and Method

This product helps **[customer]** to **[practical result]** by providing **[method, guidance, or tools]**.

Draft:

Structure C: Product Format and Task

A **[product format]** for **[customer]** who need to **[practical task]**.

Draft:

Structure D: Starting Point and Finishing Point

This product helps **[customer]** move from **[starting point]** to **[finishing point]**.

Draft:

Structure E: Problem and Practical Relief

A **[product format]** that helps **[customer]** complete **[task]** without **[specific unnecessary difficulty]**.

Draft:

7. Outcome Credibility Check

- The outcome is specific.

- The customer can recognise when it has been achieved.
- The product directly supports it.
- It matches the customer's current stage.
- It does not promise a wider result outside the product's control.
- It sounds natural.
- It is clear without needing a long explanation.
- It does not depend on exaggerated language.

What still feels vague?

What needs narrowing?

Final Product Outcome Statement

Supporting Explanation

Complete this short description:

The customer begins with _____.

The product guides them through _____.

By the end, they should have _____.

Product Content Map

Purpose of This Tool

Use this map to organise the product in a logical order.

Each section should help move the customer from their starting point to the intended result. The map should show what the customer needs to understand, decide, do, and check.

Product Overview

Working title:

Primary customer:

Main problem:

Product format:

Main outcome:

1. Customer Movement

Starting point

Finishing point

Main gap between them

2. Product Flow

A practical product often moves through some version of this sequence:

1. Understand
2. Prepare
3. Decide
4. Act
5. Check
6. Continue

Not every product needs all six stages.

Choose only what suits the task.

3. Main Section Map

Section	Customer Need	Main Content	Action or Decision	Support Tool	Result of Section
1					
2					
3					
4					
5					
6					
7					
8					

4. Opening Section

What does the customer need to understand before beginning?

What should the opening reassure them about?

What instructions are needed?

What should not be explained at length?

5. Understanding Sections

Which ideas must be understood before action becomes possible?

Idea 1

Why it matters:

Idea 2

Why it matters:

Idea 3

Why it matters:

Could any explanation be shortened or moved to a reference page?

6. Decision Sections

What decisions must the customer make?

Decision Information Needed Tool or Question That Helps Completed Decision

7. Action Sections

What must the customer do?

Action 1

Instructions required:

Support material required:

Action 2

Instructions required:

Support material required:

Action 3

Instructions required:

Support material required:

8. Examples

Where might the customer understand the explanation but struggle to apply it?

What example would help?

Would a weak and strong comparison be useful?

- Yes
- No

What should the example demonstrate?

9. Templates, Worksheets, and Checklists

Tool Purpose Where It Appears What Difficulty It Removes

10. Completion Section

How will the customer know they have finished?

What should they check?

What should they have completed or created?

What should they do next?

What is outside the product's scope?

11. Sequence Review

Does the content appear in the order the customer needs it?

- Yes
- Mostly
- No

Does any section require knowledge that appears later?

Does any action appear before enough explanation has been given?

Does the customer spend too long reading before doing anything?

Could an early practical action help them begin?

12. Content Balance

Estimated balance:

Explanation: _____ %

Reflection or decision-making: _____ %

Practical action: _____ %

Examples: _____ %

Reference material: _____ %

Does this balance suit the product?

- Yes
- No
- Unsure

What should increase?

What should decrease?

13. Scope Review

Which section is most important?

Which section may be unnecessary?

Which section may be too advanced?

Which section belongs in another product?

Which section needs more practical support?

Final Product Content Map

Opening

Section 1

Section 2

Section 3

Section 4

Section 5

Completion

Support materials

Deliberately excluded

Outsourcing Decision Sheet

Purpose

As your digital product grows, you may reach a point where you cannot—or simply do not want to—do every task yourself.

That is perfectly normal.

The goal is not to outsource as much as possible. Nor is it to prove that you can do everything alone.

Instead, the aim is to make sensible decisions about where your own time is best spent and where another person's skills could improve the finished product.

This worksheet will help you think through those decisions before spending money or investing additional time learning new skills.

Section 1 – The Task

What task am I considering outsourcing?

Why does this task need to be completed?

How important is this task to the customer's experience?

☐ Essential

☐ Very Important

☐ Helpful

☐ Nice to Have

Section 2 – Can I Do It Myself?

Be honest with yourself.

Current confidence level

☐ Very confident

☐ Reasonably confident

☐ Limited experience

☐ No experience

If I completed this myself:

Estimated hours required

Would I enjoy learning this skill?

☐ Yes

☐ Maybe

☐ No

Will I use this skill regularly in future products?

☐ Frequently

☐ Occasionally

☐ Probably not

Would learning this delay my product significantly?

☐ Yes

☐ No

☐ Unsure

Section 3 – Could Someone Else Do It Better?

If I outsourced this task:

What improvements might I expect?

What risks should I consider?

Examples might include:

- Extra cost
- Delays
- Misunderstood instructions
- Lower quality than expected
- Revisions taking longer than planned

Section 4 – Cost vs Value

Estimated outsourcing cost

£/\$ _____

Estimated time I would save

Would the improved quality justify the cost?

☐ Definitely

☐ Probably

☐ Unsure

☐ Probably not

Would outsourcing allow me to focus on more valuable work?

☐ Yes

☐ No

Why?

Section 5 – Writing a Clear Brief

If someone else completed this task, what would they need to know?

Customer

Product purpose

Expected outcome

Required files

Style or appearance

Deadline

Anything that must not be changed

Section 6 – Decision

After completing this worksheet, I have decided to:

☐ Complete this task myself

☐ Outsource the entire task

☐ Outsource part of the task

Reason for my decision

Reflection

Looking ahead to future products:

Which skills would I like to develop myself?

Which tasks would I happily outsource again?

Remember, the goal is not to prove that you can do everything yourself.

The goal is to create a product that genuinely helps your customer.

Product Quality Review Checklist

Purpose

Before your product is ready for customers, it deserves one final review.

This checklist helps you move beyond simply asking, "Is it finished?"

Instead, it encourages you to ask:

"Is it clear, useful, complete, and easy to use?"

Work through the checklist slowly.

If possible, leave the product for at least a day before completing this review. Fresh eyes often notice things that are difficult to see immediately after finishing.

Section 1 – The Customer

Does the product clearly identify who it is for?

- ☐ Yes
- ☐ Mostly
- ☐ Needs work

Is the customer's main problem addressed throughout?

- ☐ Yes
- ☐ Mostly
- ☐ Needs work

Does the promised outcome remain realistic?

- ☐ Yes
- ☐ Mostly
- ☐ Needs work

Notes

Section 2 – Content

Every section should have a purpose.

Review each one.

Question	Yes	Needs Work
Does every section support the main outcome?	☐	☐
Is anything repeated unnecessarily?	☐	☐
Is anything important missing?	☐	☐
Is the order logical?	☐	☐
Are transitions smooth?	☐	☐

Notes

Section 3 – Clarity

Can someone new to the topic understand the instructions?

- ☐ Yes
- ☐ Mostly
- ☐ Needs work

Have unfamiliar terms been explained?

☐ Yes

☐ No

Do worksheets explain what customers should do?

☐ Yes

☐ Mostly

☐ Needs work

Are examples realistic and easy to follow?

☐ Yes

☐ Mostly

☐ Needs work

Where might customers become confused?

Section 4 – Practical Resources

Review every supporting resource.

Resource	Complete	Tested
Workbook	☐	☐
Checklist	☐	☐
Template	☐	☐
Planner	☐	☐

Resource	Complete	Tested
Spreadsheet	☐	☐
Calculator	☐	☐
Bonus Guide	☐	☐
Other	☐	☐

Do all resources work together?

☐ Yes

☐ Mostly

☐ Needs work

Section 5 – Customer Experience

Imagine downloading the product for the very first time.

Ask yourself:

Would I know where to begin?

☐ Yes

☐ No

Would I understand which file to open first?

☐ Yes

☐ No

Would I understand how the resources work together?

☐ Yes

☐ No

Would I feel overwhelmed?

☐ Yes

☐ No

What could make the experience simpler?

Section 6 – Technical Review

Have I checked:

☐ Page numbers

☐ Spelling

☐ Grammar

☐ Headings

☐ Links

☐ File exports

☐ Printable pages

☐ Editable fields

☐ Spreadsheet formulas

☐ Download files

☐ Navigation

☐ Consistent fonts

☐ Consistent spacing

☐ Image quality

Any remaining issues?

Section 7 – Final Confidence Check

Complete these statements.

The strongest part of this product is:

The weakest part is:

If I were my ideal customer, would I feel this product was worth the price?

☐ Definitely

☐ Probably

☐ Not yet

Why?

Ready for Release?

Before publishing, can you honestly say:

☐ This product delivers what it promises.

- ☐ I have removed unnecessary content.
- ☐ The practical resources genuinely help the customer.
- ☐ The instructions are easy to follow.
- ☐ The files have been tested.
- ☐ The product feels organised.
- ☐ I would feel comfortable recommending it to someone I know.

Final Reflection

No product is ever perfect.

There will almost always be another example you could add, another page you could redesign, or another sentence you could rewrite.

The important question is not whether further improvements are possible.

It is whether your customer can confidently use the product to solve the problem you set out to help them with.

If your answer is yes, then your product is ready to begin helping real people—and that is ultimately the measure that matters.

File Organisation Guide

Purpose

Creating a digital product often means working with many different files.

You may have drafts, worksheets, spreadsheets, images, covers, templates, printable versions, editable versions, and final exports. As the project grows, it becomes surprisingly easy to lose track of what is current and what is no longer needed.

This guide will help you organise your files in a simple, practical way.

The goal is not to build a complicated filing system. It is to make sure you can quickly find what you need today, next month, and when you return to update the product in the future.

Section 1 – Create One Home for the Entire Project

Begin by choosing one main folder for your product.

Everything related to that product should live inside it.

Example:

Digital Product Business Toolkit

Instead of storing files across your desktop, downloads folder, cloud storage, and email attachments, keep everything together in one location.

This reduces confusion and makes backups much easier.

My Product Folder

Folder Name

Folder Location

Cloud Backup

☐ Yes

☐ No

If yes, where?

Section 2 – Recommended Folder Structure

A simple folder structure is usually all you need.

Example:

Digital Product Business Toolkit

|

|— 01 Planning

|— 02 Research

|— 03 Drafts

|— 04 Images

|— 05 Worksheets

|— 06 Templates

|— 07 Final Source Files

|— 08 Customer Delivery Files

|— 09 Archive

You may not need every folder.

The important thing is that each type of file has a logical home.

My Folder Structure

Planning

Research

Drafts

Graphics

Product Files

Customer Files

Archive

Other

Section 3 – Naming Files Clearly

One of the simplest ways to stay organised is to give every file a descriptive name.

Ask yourself:

"If I saw this file six months from now, would I immediately know what it contains?"

Good examples:

- Start Here Guide
- Product Creation Planner
- Weekly Production Schedule
- Pricing Calculator
- Launch Checklist
- Sales Page Template
- Customer Workbook
- Printable Planner

- Editable Workbook

Less helpful examples:

- New Version
- Final
- Final New
- Latest
- Copy
- Workbook2
- Untitled

Clear names remove guesswork.

My File Naming Rules

How will I name my files consistently?

Section 4 – Version Control

As you make changes, new versions naturally appear.

Without a simple system, it becomes difficult to know which version is the correct one.

Instead of creating names like:

- Final
- Final New
- Final Final
- Final Updated
- Final Latest

choose a consistent approach.

For example:

- Workbook v1.0
- Workbook v1.1
- Workbook v1.2

Or

- Workbook 2026-07-18
- Workbook 2026-08-02

The exact system matters less than using it consistently.

Version Tracking

File Current Version Date Updated

Section 5 – Customer Delivery Folder

Before uploading your product, create one folder containing only the files customers should receive.

This folder should not include:

- Working drafts
- Notes
- Research
- Unused images
- Old versions
- Planning documents

Instead, it should contain only the finished materials.

Delivery Folder Checklist

- ☐ Start Here Guide
- ☐ Main Product
- ☐ Worksheets
- ☐ Templates
- ☐ Checklists
- ☐ Bonuses
- ☐ Resource List
- ☐ Licence (if required)

☐ Read Me file (if needed)

☐ Contact information (if appropriate)

Have I opened every file inside this folder?

☐ Yes

☐ No

Section 6 – Backup Plan

Losing your work can be frustrating, especially after weeks of careful effort.

Take a few minutes to think about how your files will be protected.

Current backup method

☐ External hard drive

☐ Cloud storage

☐ Automatic backup software

☐ USB drive

☐ None yet

How often will I back up this project?

☐ Daily

☐ Weekly

☐ Monthly

☐ After major updates

Where will my backup be stored?

Section 7 – Future Updates

Most digital products improve over time.

Customers may ask useful questions.

You may think of better examples.

A broken link might need replacing.

A worksheet might become clearer after receiving feedback.

Planning for updates now makes future improvements much easier.

Possible updates to consider

How often will I review this product?

☐ Every 3 months

☐ Every 6 months

☐ Once a year

☐ When significant changes are needed

Section 8 – Product Inventory

Record every file that belongs to your finished product.

File Name Format Customer Receives?

☐

☐

☐

File Name Format Customer Receives?

- ☐
- ☐
- ☐
- ☐
- ☐

This simple inventory becomes especially useful when your product grows or new versions are released.

Section 9 – Final File Review

Before publishing, work through this checklist.

Organisation

- ☐ Every file has a clear name.
- ☐ Files are stored in the correct folders.
- ☐ Old drafts have been archived.
- ☐ Customer files are separated from working files.

Quality

- ☐ Every document opens correctly.
- ☐ Every spreadsheet works.
- ☐ Every worksheet is complete.
- ☐ Every PDF exports correctly.
- ☐ Links have been tested.
- ☐ Images display properly.

Customer Experience

- ☐ The first file customers see is obvious.
- ☐ Instructions are easy to find.
- ☐ Files appear in a logical order.
- ☐ Nothing unnecessary has been included.
- ☐ Customers will not need to guess where to begin.

Future Management

- ☐ The latest versions are clearly identified.
- ☐ A backup exists.
- ☐ I know where every source file is stored.
- ☐ I could update this product easily in six months' time.

Final Reflection

Look back over everything you have organised.

Ask yourself:

If I opened this project one year from now, would I immediately understand how everything fits together?

If another trusted person needed to update this product, could they find the correct files without confusion?

What one improvement could I make today that would save me time in the future?

Closing Thought

Good organisation is rarely noticed when everything works well.

Its value becomes obvious only when you need to make a change, fix a problem, or prepare a new edition.

By spending a little time organising your files now, you make future updates simpler, reduce unnecessary stress, and create a smoother experience for both yourself and your customers.

It is one of the quiet habits that supports every successful digital product, no matter how large or small.

Headline Builder

Purpose

Use this tool to create a headline that is clear before trying to make it more polished.

The strongest headline is not always the most unusual one. It is usually the one that helps the intended customer understand the offer most quickly.

Part A: Basic Information

Product name:

Product type:

Intended customer:

Problem addressed:

Practical result supported:

Main method or resource provided:

Part B: Choose a Headline Direction

Result-Focused

Helps the reader understand what they may be able to do.

Create or achieve:

Without or while avoiding:

Draft:

Example structure:

Create [practical result] without [common complication].

Product-Focused

Explains what the product is and what it helps with.

Product type:

Purpose:

Draft:

Example structure:

A practical [product type] for [purpose].

Audience-Focused

Makes the intended customer clear.

Audience:

What they want help with:

Draft:

Example structure:

[Product or result] for [specific audience].

Problem-Focused

Begins with the difficulty the customer wants to solve.

Problem:

Practical improvement:

Draft:

Example structure:

A simpler way to [solve or manage problem].

Process-Focused

Emphasises a manageable method.

Starting point:

End point:

Draft:

Example structure:

Move from [starting difficulty] to [practical outcome] with [method].

Part C: Write Five Plain Options

Do not try to make these clever. Aim for immediate understanding.

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

Part D: Supporting Subheading

Use the subheading to explain what the headline cannot include naturally.

What is the product?

What does it contain?

How does it help?

Subheading draft:

Part E: Headline Test

Score each headline from 1 to 5.

Headline Option Clear Relevant Believable Specific Natural

Option 1 _____ _____ _____ _____ _____

Option 2 _____ _____ _____ _____ _____

Headline Option	Clear	Relevant	Believable	Specific	Natural
Option 3	___	___	___	___	___
Option 4	___	___	___	___	___
Option 5	___	___	___	___	___

Highest-scoring option:

Final Questions

- Would the intended customer understand it within a few seconds?
- Does it describe what the product genuinely helps with?
- Does it sound natural when read aloud?
- Is any word there only to make it sound impressive?
- Could a shorter version be clearer?

Final headline:

Final subheading:

Benefit Writing Worksheet

Purpose

Use this worksheet to turn product features into clear, believable benefits.

A feature tells the customer what is included. A benefit explains why that feature matters.

Part A: List the Main Features

Feature	What It Is
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____

Part B: Ask Why Each Feature Matters

For every important feature, complete the sentence:

This helps the customer to...

Feature 1

Feature:

Helps the customer to:

Practical benefit:

Feature 2

Feature:

Helps the customer to:

Practical benefit:

Feature 3

Feature:

Helps the customer to:

Practical benefit:

Feature 4

Feature:

Helps the customer to:

Practical benefit:

Feature 5

Feature:

Helps the customer to:

Practical benefit:

Part C: Types of Practical Benefit

Tick the kinds of value your product provides.

- ☐ Saves time
- ☐ Reduces confusion
- ☐ Creates structure
- ☐ Makes comparison easier
- ☐ Helps prevent omissions
- ☐ Reduces repeated work
- ☐ Makes a task easier to begin
- ☐ Helps organise information
- ☐ Supports better decisions
- ☐ Provides a clear sequence
- ☐ Improves consistency
- ☐ Helps the customer prepare
- ☐ Makes progress easier to track
- ☐ Other: _____

Part D: Write the Benefit Naturally

Avoid vague statements such as:

- saves you time and money
- gives you everything you need
- makes success easy
- removes all stress
- guarantees better results

Use specific wording instead.

Formula

Feature + practical function + customer value

Example:

The editable pricing calculator allows you to test different prices and see how fees affect the amount you keep from each sale.

Now write your own.

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

Part E: Benefit Strength Check

For each benefit, ask:

Question	Yes	No
Is it specific?	☐	☐
Is it believable?	☐	☐
Does the product directly contribute to it?	☐	☐
Would the customer understand why it matters?	☐	☐
Does it avoid promising a result outside the product's control?	☐	☐
Does it sound natural when read aloud?	☐	☐

Benefits that need revising:

Part F: Select the Main Benefits

Choose three to five benefits for the main sales page.

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

Why are these the strongest benefits?



Product Contents Section

Purpose

Use this tool to explain exactly what the customer receives and what each part helps them do.

A contents section should be clear enough that the customer does not need to guess what is inside the product.

Part A: Product Inventory

List every main resource.

Resource	Format	Purpose	Essential or Bonus
1. _____	_____	_____	Essential / Bonus
2. _____	_____	_____	Essential / Bonus
3. _____	_____	_____	Essential / Bonus
4. _____	_____	_____	Essential / Bonus
5. _____	_____	_____	Essential / Bonus
6. _____	_____	_____	Essential / Bonus
7. _____	_____	_____	Essential / Bonus
8. _____	_____	_____	Essential / Bonus
9. _____	_____	_____	Essential / Bonus
10. _____	_____	_____	Essential / Bonus

Part B: Group Related Resources

Group 1

Group title:

Items:

- _____
- _____

-

Shared purpose:

Group 2

Group title:

Items:

-
-
-

Shared purpose:

Group 3

Group title:

Items:

-
-
-

Shared purpose:

Part C: Write Each Description

Use this structure:

Resource name

A short explanation of what it is and how it helps.

Resource 1

Name:

Description:

Resource 2

Name:

Description:

Resource 3

Name:

Description:

Resource 4

Name:

Description:

Resource 5

Name:

Description:

Part D: Delivery Details

Total number of files or resources:

File formats:

Delivery method:

Access time:

Printable:

- ☐ Yes
- ☐ No
- ☐ Some files

Editable:

- ☐ Yes
- ☐ No
- ☐ Some files

Software required:

Updates included:

Part E: Contents Section Draft

Suggested Opening

Here is what is included in [product name]:

Draft:

Final Check

- ☐ Every major item is named
- ☐ Each important item has a clear purpose
- ☐ Related resources are grouped together
- ☐ The page does not rely on an impressive number alone
- ☐ The file formats are explained
- ☐ Delivery information is clear
- ☐ Bonuses are genuinely useful and relevant
- ☐ The section is easy to scan

Call-to-Action Examples

Purpose

Use these examples to choose clear wording for buttons and nearby supporting text.

A call to action should tell the customer what to do next and, where useful, what will happen after they click.

Direct Purchase Buttons

- Get the Digital Product Business Toolkit
- Buy the Workbook
- Purchase the Complete Toolkit
- Get Immediate Access
- Download the Full Resource Pack
- Start Planning Your Product
- Get the Templates
- Purchase the Guide
- Get the Complete Bundle
- Continue to Secure Checkout

Low-Cost Product Buttons

- Download the Checklist
- Get the Planner
- Buy the Template
- Get the Worksheet Pack
- Download the Calculator
- Purchase the Printable
- Get the Quick-Start Guide

Bundle Buttons

- Get the Complete Bundle
- Choose the Full Toolkit
- Purchase All Resources
- Get the Guide and Templates

- Buy the Complete Planning Pack
- Get the Full Resource Library

Supporting Sentences

Delivery

- Your files will be available immediately after payment.
- Purchase securely and download the product straight away.
- You will receive access instructions by email after checkout.
- The downloadable files will appear on the confirmation page.

Payment

- One-time payment. No subscription.
- Pay once and keep access to the files.
- The price shown is the full purchase price.
- Secure payment is processed through the checkout provider.

Suitability

- Created for first-time digital product creators.
- Suitable for beginners who want a clear starting structure.
- Use the tools at your own pace and return to them when needed.
- Designed for independent creators and small online businesses.

Reassurance

- Review everything included before deciding.
- Read the common questions below for delivery and access details.
- Please check the file formats before purchasing.
- The product description explains exactly what you will receive.

Call-to-Action Builder

Complete the following.

Action verb:

- ☐ Get
- ☐ Buy
- ☐ Download
- ☐ Purchase
- ☐ Start

- ☐ Choose
- ☐ Access
- ☐ Other: _____

Product name or type:

Button draft:

What happens after the customer clicks?

Supporting sentence:

Button Placement Planner

Page Location	Button Needed?	Button Wording
Near the top	Yes / No	_____
After main benefits	Yes / No	_____
After product contents	Yes / No	_____
After proof	Yes / No	_____
After FAQs	Yes / No	_____
Bottom of page	Yes / No	_____

Use the same main action consistently unless there is a clear reason to offer a different choice.

Call-to-Action Check

- ☐ The button explains the action
- ☐ The customer knows what they are buying
- ☐ The wording matches what happens next
- ☐ The button does not create false urgency
- ☐ The same offer is described consistently
- ☐ Delivery information appears nearby

☐ The price is easy to find

☐ The button is easy to see without overwhelming the page

Customer Experience Map

Purpose

Use this map to see the purchase from the customer's point of view.

The aim is to identify what the customer sees, what they need to understand, and where confusion may arise from the moment they decide to buy.

Part A: Customer and Product

Product name:

Product type:

Price:

Intended customer:

Main reason they are buying:

What they are likely to expect immediately after payment:

Part B: Map the Full Experience

Stage 1: Sales Page

What does the customer see?

What do they need to understand?

What action should they take?

What may confuse them?

Improvement needed:

Stage 2: Checkout

What does the customer see?

What information must be clear?

What details are they asked to provide?

What may make them hesitate?

Improvement needed:

Stage 3: Payment Confirmation

What appears immediately after payment?

Does it clearly confirm that the order was successful?

- ☐ Yes
- ☐ No
- ☐ Partly

Does it name the product purchased?

- ☐ Yes
- ☐ No

Does it explain what happens next?

- ☐ Yes
- ☐ No

Improvement needed:

Stage 4: Receipt

Who sends the receipt?

What subject line does the customer see?

Does the receipt show the correct product and price?

- ☐ Yes
- ☐ No
- ☐ Not yet tested

Is it clear whether the payment is one-time or recurring?

- ☐ Yes
- ☐ No
- ☐ Not applicable

Improvement needed:

Stage 5: Welcome or Delivery Email

What email arrives?

How quickly should it arrive?

Is the product name in the subject line?

☐ Yes

☐ No

Is the access link easy to find?

☐ Yes

☐ No

Does the email explain where to begin?

☐ Yes

☐ No

Improvement needed:

Stage 6: Product Access

How does the customer access the product?

☐ Direct download

☐ Email link

☐ Customer account

☐ Membership area

☐ Shared folder

☐ Other: _____

What is the first thing they see?

Can they begin without contacting support?

- ☐ Yes
- ☐ No
- ☐ Unsure

What may prevent access?

Improvement needed:

Stage 7: First Use

Which file or page should the customer open first?

Is that starting point obvious?

- ☐ Yes
- ☐ No

Are the files in a clear order?

- ☐ Yes
- ☐ No

Are optional resources identified?

- ☐ Yes
- ☐ No
- ☐ Not applicable

Could the customer begin within five minutes?

- ☐ Yes
- ☐ No
- ☐ Unsure

Improvement needed:

Stage 8: Support

Where can the customer ask for help?

What kind of support is included?

What is not included?

Expected reply time:

Is this information easy to find?

☐ Yes

☐ No

Improvement needed:

Stage 9: Refund or Problem Resolution

Where is the refund policy shown?

How does the customer make a request?

Who handles the request?

What records should be kept?

Improvement needed:

Part C: Customer Questions at Each Stage

Stage	Likely Customer Question	Where the Answer Appears
Sales page	_____	_____
Checkout	_____	_____
Confirmation	_____	_____
Email	_____	_____
Access	_____	_____
First use	_____	_____
Support	_____	_____
Refund	_____	_____

Part D: Experience Gaps

The three points most likely to confuse the customer are:

1. _____
2. _____
3. _____

The three most important improvements are:

1. _____
2. _____
3. _____

Final Customer Experience Statement

Complete this sentence:

After buying, the customer will first _____, then
_____, and finally _____. If they need
help, they can _____.

Refund Policy Planning Worksheet

Purpose

Use this worksheet to decide what the refund policy needs to cover before drafting formal wording.

Refund rights and legal requirements vary by location, product type, delivery method, and selling platform. This worksheet is for planning and should not be treated as legal advice.

Part A: Product Details

Product name:

Product type:

- ☐ Downloadable files
- ☐ Online course
- ☐ Membership
- ☐ Subscription
- ☐ Template or software tool
- ☐ Live workshop
- ☐ Service with digital materials
- ☐ Other: _____

Price:

How it is delivered:

Is access immediate?

- ☐ Yes
- ☐ No

Can the product be copied or fully consumed soon after purchase?

- ☐ Yes
- ☐ No
- ☐ Partly

Part B: Legal and Platform Requirements

Countries or regions where the product will be sold:

Platform refund rules:

Payment-provider rules:

Consumer-law guidance reviewed:

- ☐ Yes
- ☐ No
- ☐ Needs professional advice

Source or adviser consulted:

Part C: Refund Approach

Which broad approach appears suitable?

- ☐ Refunds available within a stated period
- ☐ Refunds available only under stated conditions
- ☐ Refunds available before download or access
- ☐ Case-by-case review
- ☐ Limited refund rights for digital delivery, subject to applicable law
- ☐ Subscription cancellation with access until period end
- ☐ Other: _____

Reason for this approach:

Part D: Time Period

Refund request period:

_____ days after purchase

Why this period is reasonable:

When does the period begin?

- ☐ Purchase date
- ☐ Delivery date
- ☐ First access
- ☐ Other: _____

Part E: Conditions

Possible conditions to consider:

- ☐ Duplicate purchase
- ☐ Product not delivered
- ☐ Corrupted or unusable files
- ☐ Product materially different from description
- ☐ Technical problem that cannot be resolved
- ☐ Accidental purchase
- ☐ Customer dissatisfaction
- ☐ Customer changed their mind
- ☐ Customer did not use the product
- ☐ Customer expected an unadvertised feature
- ☐ Customer failed to meet stated technical requirements
- ☐ Other: _____

Conditions under which a refund may be approved:

Conditions that may not qualify, subject to applicable law:

Part F: Evidence and Information Required

What should the customer provide?

- ☐ Order number
- ☐ Email used at checkout
- ☐ Product name
- ☐ Date of purchase
- ☐ Description of the problem
- ☐ Screenshot or error message
- ☐ Confirmation that troubleshooting was attempted
- ☐ Other: _____

Avoid asking for information that is not necessary.

Part G: Refund Request Process

How should the customer request a refund?

- ☐ Reply to purchase email
- ☐ Support email
- ☐ Contact form
- ☐ Platform request system
- ☐ Other: _____

Contact details:

Expected acknowledgement time:

Expected decision time:

Who reviews the request?

Part H: After Approval

Who processes the refund?

How is the refund returned?

Typical processing period:

Does product access end?

☐ Yes

☐ No

☐ Depends on the product

What confirmation is sent?

Part I: Subscription or Recurring Payments

Complete only if relevant.

Billing frequency:

How can the customer cancel?

When does cancellation take effect?

Does access continue until the end of the paid period?

☐ Yes

☐ No

Are previous payments refundable?

Part J: Policy Visibility

Where will the policy appear?

- ☐ Sales page
- ☐ Checkout
- ☐ Terms page
- ☐ Frequently asked questions
- ☐ Confirmation page
- ☐ Welcome email
- ☐ Customer account
- ☐ Other: _____

Where must the customer agree to it?

Part K: Plain-Language Policy Notes

Complete these sentences before drafting the formal policy.

Customers may request a refund within _____.

A refund may be considered when _____.

A refund may not normally be available when _____.

Requests should be sent to _____.

Customers should include _____.

Approved refunds are returned through _____.

Processing may take _____.

Policy Review

- ☐ The policy is consistent with applicable requirements
- ☐ The platform rules have been checked
- ☐ The wording is easy to understand

- ☐ Important limitations are not hidden
- ☐ The request process is clear
- ☐ Response times are realistic
- ☐ The policy does not make promises the business cannot keep
- ☐ The policy is visible before purchase
- ☐ The policy will be reviewed when the product or platform changes

Customer Feedback Log

Purpose

Instead of relying on memory, collect customer comments in one place. Patterns become much easier to spot over time.

Date Customer Comment

Category

Action Needed

Praise / Question / Suggestion / Issue

Common Themes

Questions customers ask repeatedly

Features customers appreciate most

Common areas of confusion

Repeated suggestions

Priority Improvements

High Priority

Medium Priority

Low Priority

Product Range Map

Purpose

As your business grows, it becomes easier to lose sight of how your products fit together. This worksheet helps you organise your product range so customers can move naturally from one solution to the next.

My Customer's Journey

What problem brings people to my business?

What is the first result they want?

What is the next challenge they usually face?

My Product Pathway

Stage	Product Price Purpose
Free Resource	
Starter Product	
Core Product	
Premium Product	
Future Product	

Product Relationships

Draw arrows or describe how each product leads naturally to the next.

Missing Opportunities

What questions do customers ask that I do not currently solve?

Products to Remove, Merge or Improve

Quarterly Review Worksheet

Purpose

Every three months, step back and review your business as a whole. This worksheet helps you identify patterns and decide what to do next.

Quarter

Looking Back

Biggest Achievements

Biggest Challenges

Business Performance

Revenue

£ _____

Profit

£ _____

Products Sold

Email List Growth

Most Popular Product

What Did Customers Teach Me?

Improvements Made

What Should Stay the Same?

What Should Change?

Decisions for the Next Quarter

Tick all that apply.

- ☐ Continue promoting current products
- ☐ Improve existing products
- ☐ Create a related product

- ☐ Build a product bundle
- ☐ Increase marketing activity
- ☐ Simplify the business
- ☐ Remove an underperforming product
- ☐ Learn a new business skill

My Three Most Important Goals

Goal 1

Goal 2

Goal 3

Final Reflection

Looking back over the last three months, what is the single biggest lesson I want to carry into the next quarter?

Together with the five worksheets from Part 1, these complete a cohesive set of **10 business planning tools** that take readers from planning their first product through tracking performance, improving their products, and managing a growing digital product business. They are intentionally simple, printable, and reusable so readers can return to them month after month.