

# 2021 Embroidery Business Planning Workshop Workbook



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## Preliminary Planning

Please go over each one of these questions and fill them in to the best of your knowledge. This is going to help you with creating your 2021 plan.

**What was great about 2020?**

**What are your wins for this year?**

**What are your losses for this year?** *List each one on a spreadsheet along with the dollar amount.*

**What should or could I have done differently?**

**Is there something that I could have done to prevent any of these losses?**

**Did you have goals set for 2020?** *List each one.*

**Did you meet your goals?**

**If you did not meet your goals, how far were you from meeting your goals?**

**If you exceeded your goals, by how much did you exceed them?**

**What did you discover that you enjoyed doing the most in your business?** Make a list of each one.

**What did you discover that you did not want to do anymore in your business?** Is it or are they items that you can pass on to someone else? If bookkeeping is one of those items, hire a part time bookkeeper to keep up with your books while you keep your production going.

**What Skills did you learn this year?**

**What Skills do you need to learn to be able to move forward in your business?**

**What worked for you in 2020 that you want to do again in 2021??**

**What items or type of items do you want to promote for 2021?**

**How did you do in the area of Follow up with your customers?**

**What did you do in the area of Email Marketing?**

**Do you have an Automatic Emailing System set Up? If so, which one?**

**What did you do in the area of Social Media?**

**What Social Media Platforms are you currently using?**

**Do you have a Social Media Calendar?**

**How did you do in the area of time management?**

**Are you using the Production Tracking System?**

**Are you able to get your jobs all done on time or ahead of schedule?** Explain what issues you are having with job production.

**Do you have Goals set for 2021?** (Write down a list of 3 main goals that you want to accomplish during 2021) (Be specific-This can be personal or business or both. A goal must be measurable so that you can see the actual results when you reach it or if you did not reach it.)

**Do you have a Cash Flow Statement created for 2021?**

Please have all of these answered by the time we start our workshop on Sunday. It will make it easier to create your plan.