

Template Ideas To Save You Time

Templates are a great way to systemize your work. Templates are a “create once – use often” tool that will save you time and stress. Templates provide consistency across all your print and digital materials. They are useful for your business as well as for your leisure activities.

Journal Templates

Project Journal Pages



You can buy a journal, but a template allows you to customize the information you track. I keep several project journals. They help me keep track of quilting, fiber art, garment sewing, and gardening projects. I bought a gardening journal, but the rest are custom pages.

Each journal has a different set of information and a different purpose. They all help me to improve my results and repeat my favorite projects.

Success Pages

Goals are wishes with an action plan. Success pages can be used to prepare for the next day's activities and intentions. Just like journals, a template allows you to create customized success pages.

New Client Templates

Agreement/Contract

Before starting a new project, an agreement or contract is important. Turn your contract into a template so you don't waste valuable time at the start of a new client relationship.

New client intake

Get consistent information from each client so you don't have to go back and ask for more information later. A client intake template helps you form a strong foundation for future work.

Welcome package

A welcome package is essential for a coaching or consulting practice. But they are helpful for other types of business too.

A B&B owner may want to send a welcome package to a new guest that explains the amenities they offer, a map of the area, and a list of items the guest might want to bring with them.

A custom quilter might include some popular quilting designs, or a recap of the decisions the customer has made about how their quilt is to be finished.

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Bookkeeping/Accounting Templates

Quotation/Proposal

Your template contains the common information for every service you offer. You add the specifics or delete any information that is not relevant to the project. Bookkeeping software can provide a basic quotation template.

A complex proposal may end up being 20 pages or more. A Word template makes it easy to turn a complex proposal into a work plan.

Invoice/Receipt

The basic information is in the template, you add the specifics.

Bookkeeping software will have invoice templates that you can customize. Bonus: the math is done for you and your accounting is kept up to date at the same time!

Marketing Templates

Blog post

Give yourself a head start with a fill-in-the-blank template. Start with a basic blog post outline and skip the anxiety-causing empty page. You'll never forget to include that all important call to action!

E-book

An e-book template can include a content outline as well as styles. The header and footer, fonts, heading styles, and other formatting will be consistent for all your e-books.

One-Sheet

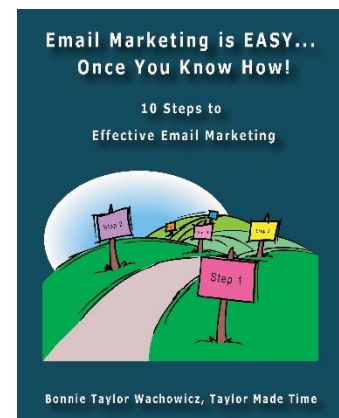
This is a single sheet that outlines the features and benefits of a single product or service. A template ensures a consistent look across all the products and services you offer.

Production Templates

Client Information

Client information may be simple or complex. While client information may end up being stored in a database, the template is a useful tool to ensure information is collected consistently.

A custom seamstress/sewist may keep a variety of information about his/her clients. Likes and dislikes, measurements, and specific style preferences are just as important as the client's contact information. Keeping a record of changing measurements for a client is important. If a future measurement is inaccurately recorded, you can compare with a previous measurement.



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Project Intake

When a customer submits their project for completion, this template will ensure that they are providing the essential information and supplies. This can be posted as a downloadable form from your website.

Meeting Agenda/Minutes

Using an agenda for a client meeting shows respect for their time and ensures that important topics are not missed. Minutes can be formal or informal. Keeping minutes helps people stay accountable to the actions discussed. These templates are also useful for volunteer meetings, and mastermind groups.

Mastermind Agenda

DATE:	
TIME:	
LOCATION & BRAINSTORMING:	
GOALS:	
ACTION PLAN:	
ATTENTION:	

Host Meeting: _____

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Scripts

Scripts are a great way to systemize your work. A podcast script template can help you stay on track with the time and topic for each podcast. Scripts help employees answer specific questions or address common issues for customers.

Training Templates

Workbook/Guidebook

A guide for a student helps students integrate the information you are teaching. Consider creating a master workbook template that can be modified for different training paths. You'll be able to present a consistent image in a short time with each new training course you write.

Certificate

Attendance and achievement certificates give the student a tangible record of their achievement. Certificates also serve as a marketing tool when it hangs on the student's wall.

Get Help With Templates

If you need a hand with a specific template, [get in touch with me](#). I'm happy to offer my suggestions to systemize your business. I offer a 24-hour turnaround for a basic template. Two revisions are included at no extra cost.



Bonnie Taylor Wachowicz is a semi-retired copywriter, virtual assistant, and coach/consultant. She is also a fiction writer, working on her first novel.

Bonnie works with solopreneurs to help them connect with their customers. Her clients include creative makers (quilters, crafters, etc.) and service-based solopreneurs (coaches, instructors, etc.). Learn more about the services she offers and get a sneak peek at her novel at <https://livecheapdreambig.com>.