

Planner for My Personal Shopper Business

First Phase - Research:

1. Find out if I need a local business license, and how to apply.
2. Find out if I need a provincial or state level business license, and how to obtain it.

Do this work as a favour for at least three different people and situations then review and brainstorm from what I learned in those experiences; (use other paper for more brainstorming)

- a.
- b.
- c.

3. Check out my competition;

Who else is offering this service in my area, and what are they doing?

How much are they charging?

How much experience do they have?

Have they been in this business long?

What is their reputation like?

How would my business be better?

4. What type of Personal Shopper Business or work do I really want?

- a. Filling orders in a big store or in a warehouse?
- b. Freelance – a true business that I own and manage myself?
 - i). How many hours can I devote to this business?
 - ii). How many clients will I need to make a living?
 - iii). How will I get my clientele, and keep them?
 - iv). Will I run my business alone or have a partner or someone to help make decisions?
 - v). Will I do most of my shopping locally in stores, or online?
 - vi). How will that affect my methods and style of business?
 - vii). What is my favourite shopping niche? Can I turn that into my specialty?

- viii). Do I know anyone in the big corporation/business world? Anyone who could help me get a contract as buyer for their gifts and awards? More than one contract?
- ix). What will I charge for my services? Hourly or by shopping event? Different rates for different folks? Will I ask for an advance payment, invoice immediately after shopping for the client, or once a month?
- x). How much will it cost to start up this business? What will my operating budget be?
- xi). I need a business website! Can I do this myself, or do I need to pay someone to build it? Can I regularly update it myself? (research the options).
- xii). What will I call my business? Am I sure enough to apply for the license/permits?

My shopping methods and tips that I would use for clients:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- etc...

You could publish this as a flyer, booklet or e-book to give away as an advertising freebie, which can help people remember your service and contact you when they need you.

If your research and brainstorming in Phase 1 has convinced you this is a viable idea, you are ready to move to the next Phase. In Phase 2 you actually do many of the things you thought through in Phase 1, but you now do them for real. You are in fact, setting up your resources, registering your business, and preparing your documents so that you can advertise and promote this business. If you were very thorough in Phase 1, you may find Phase 2 comes together fairly quickly.

Second Phase – Setting up My Personal Shopper Business

Assuming You Decided to Start Your Business

1. Register your business at all the required levels. Find out if the business name you want to use is available. You can also do business under your own name.

2. Get resources in place.
 - a. vehicle for transportation (if doing any local shopping)

 - b. charge cards with a line of credit (means talking to your bank)

 - c. money in the bank sufficient for initial operating budget and surprise expenses

3. Get your business website started! It can take longer than some ads make it appear. Especially if you are doing it yourself. Some services might be slow too. Try to get the graphics coordinated with your logo for your business cards, flyers, invoices, etc.

4. Get your record-keeping documents designed or printed and in order. These can include;
 - a. cash-flow journal
 - b. bookkeeping program on your computer
 - c. access to your banking accounts
 - d. invoice template so you can quickly prepare invoices to email or to print/mail
 - e. information and forms about taxes you are required to charge
 - f. client profile cards – just for your own reference records
 - g. client Contract card/sheet to fill out for each job (...or only once if you will be on retainer)
 - h. Thank you cards in print or digital, to send to clients (include a request for feedback and recommendation – which you can use in your advertising).
 - i. business cards, brochures and flyers/info-cards or postcards
 - j. text and graphic ads you will use wherever you can for advertising
 - k. a daily/weekly calendar where you write in appointments or work time for clients.

5. Make family arrangements, such as babysitting, etc., to free you for your shopping hours for clients. Don't forget to schedule in bookkeeping time too, and some promotional efforts, or regret it later.

6. Everything in place? Time to start advertising for clients, or asking friends and individuals you know. You may offer a special for the start. Spread the word on social media.

7. Don't forget that there is free advertising in a press release sent to the news media. Make sure that release provides enough information for the reporters and journalists to see a good story in your new business, so that they will want to come interview you. (A little experience with helping clients will make you more confident in that media interview).

8. Keep your eyes and ears open for promotional opportunities, and new clients!