



THE  
**EMBROIDERY COACH**  
JOYCE JAGGER



# Step by Step Planning Process Guide For “Starting Your Embroidery Business!”

Use this guide to get prepared to open your embroidery business. This will help you keep track of each process as you are going through it so that you do not forget any one of the steps.

You must have all steps completed before opening up your business to take orders or you will not be prepared and will become very disorganized and you will find that the business will become overwhelming.

By completing all of the steps, your business should start out on a smooth course. This is extremely important. Get all of the preparation done the right way and then it will be much easier for you to get started and stay organized!

- **Set Your Goals**
  - a. 1 Year Business Goals
  - b. 6 Month Business Goals
  - c. 60 Day Business Goals
  - d. Weekly Goals & Plan
  - e. Today's Plan
  
- **Do all of your Preliminary Planning**
  - a. Select Your Business Name
  - b. Decide on the Location of your Business
  - c. Configure your Floor Space
  
- **Research Embroidery Machine**

- a. Provide you with a lot of great service
  - b. With very little down time
  - c. Easy contact with phone techs
  - d. And from a company that will stand behind their products!
- **Research Embroidery Design Software**
    - a. What type of work are you going to be doing with your embroidery design software?
    - b. Are you going to concentrate on lettering and stock designs?
    - c. Do you want to be able to edit your designs?
    - d. Are you going to have someone else create all of your designs for you?
    - e. Do you want to learn how to digitize?
- **Purchase your Embroidery Machine & Software-Purchase Options**
    - a. Purchasing it with your savings
    - b. Borrowing the money from family or friends (I do not advise this)
    - c. Borrowing the money from the Bank
    - d. Going to the Small Business Administration ( SBA)
    - e. Going through a Leasing Company
- **Organize each Area & Create a Floor Plan**
    - a. Showroom
    - b. Office
    - c. Receiving
    - d. Preparation
    - e. Hooping
    - f. Embroidery Production
    - g. Finishing
    - h. Shipping
- **Purchase other Tools & Equipment**
    - a. Work Shelving
    - b. Hooping Device
    - c. Steamer -Floor model
    - d. More Hoops
    - e. 18 inch Ruler
    - f. Marking Pens - Air Erasable

- g. Chalk Pencil
- h. Small flat soaps - I use hotel soaps
- i. Scissors for cutting off your backing
- j. Small Curved point scissors for getting into small areas during finishing
- k. Nippers to trim off your threads
- l. 6 inch Bent Tweezers

- **Purchase Supplies**

- a. Thread - Polyester
- b. Cutaway Backing/Stabilizer
- c. No Show Backing/Stabilizer
- d. Tearaway Backing/Stabilizer
- e. Cap Backing/Stabilizer
- f. Embroidery Topping
- g. Needles

- **Set up your Office**

- a. Computer
- b. Printer
- c. Desk
- d. Chair
- e. File cabinet

- **Set up your Business Forms**

- a. Apparel Order Form
- b. Cap Order Form
- c. Log in Form
- d. Design Quote Form
- e. Supplies Order Form
- f. Problem Tracking Sheet
- g. Design Tracking & Timing Sheet
- h. Production Tracking & Timing Sheet
- i. Embroidery Room Worksheet
- j. Customer Approval Form
- k. Packing List
- l. Order Checklist

- **Purchase your Accounting Software**
  - a. QuickBooks is Recommended-Set up properly for Embroidery Business
  
- **Get Your Profitable Pricing In Place**
  - a. Create Basic Pricing Structure
  - b. Create Basic Price List
  - c. Create your Projections
  - d. Create your Cash Flow Statement
  
- **Create Your Marketing Materials**
  - a. Signature Speech
  - b. Business Card
  - c. Brochure
  
- **Create Your Marketing Plan**
  - a. 12 Months Marketing Plan
  - b. 60 Day Marketing Plan
  - c. Weekly Marketing Plan
  
- **Create Your Working Business Plan**
  - a. Weekly Progress Checklist
  
- **Learn how to create Basic Lettering in your Embroidery software**
  
- **Practice your Design Setups and Sew them out**
  
- **Learn the Design Techniques to produce Higher Quality Designs**
  - a. Understand and learn how to use Embroidery Pull Compensation
  - b. Understand and learn how to use Embroidery Underlay Stitching
  
- **Create Samples and Sales Tools to show your Prospects & Customers**
  
- **You Are Ready to OPEN FOR BUSINESS!**
- [theembroiderycoach.com/how-to-start-an-embroidery-business/](http://theembroiderycoach.com/how-to-start-an-embroidery-business/)