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# THE EMBROIDERY COACH

## Building The Foundation of Your Embroidery Business Workbook!

### Step by Step Instructions

This workbook will help you build the foundation of your embroidery business and prepare you for opening day and beyond. As you work through it, this workbook is going to keep you on track of each process so that you do not forget any one of the steps. Phase 1 steps are all included inside of the program, [“How To Start An Embroidery Business.”](#) This is going to get you totally prepared with the Basics of Embroidery and the beginning of setting yourself up for success!

If you have already started your business, go through the checklist that you downloaded before you purchased the program, “**How To Start An Embroidery Business,**” to make sure that you have everything that you need to build a great foundation in your embroidery business.

Join the Facebook Group -

<https://facebook.com/HowToStartAnEmbroideryBusiness>

## Phase 1 - Setting Up Your Basic Structure

Planning out your business is the very first part of setting yourself up to start your embroidery business. Follow this workbook all the way through.

### Step # 1 - Set Your Goals - Start Date \_\_\_\_\_

You have 3 sets of goals plus a weekly plan and a daily plan.

- 1 Year Business Goals
- 6 Month Business Goals
- 60 Day Business Goals

- Weekly Goals & Plan
- Today's Plan

**1 Year Business Goals**-Write down the 3 main Goals that you think you would like to reach within the next year. Do not write down more than 3 goals. You cannot possibly focus on more than 3. Where do you want to see your business at the end of the next 365 days! Without set goals, you will accomplish nothing and will be too scattered.

### Goal No. 1

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### Goal No. 2

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### Goal No. 3

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**Weekly Goals and Plans** - Next you will take your 60-day plan, which is 8 weeks, and create your Weekly Goals. You really need to concentrate on one main goal for the week. You can set more than one goal, but I want you to get into the process of setting your goals and completing them. Once you are in the habit of planning and writing goals it is going to be easier for you and you will be able to reach them much quicker. If you are easily completing your main goal for the week, you can expand on them and create more than one main goal.

**Week 1** - Use this for week 1 but print out one for each week as you need them from the back of the workbook. It is very important to be consistent with your planning.

## Monday

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## Tuesday

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## Wednesday

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## Thursday

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## Friday

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## Step # 2 - Preliminary Planning

As you go through the workbook, check off each item when it is completed.

- What did you decide for your Business Name?

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- Purchase your Dot.com Name-Go to <http://smallbusinessmarketingdomains.com/> and purchase your domain name. Don't forget to purchase your personal name as well, if it is available. What is your Dot.com name?

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- Register your Business name with the authorities in your city, town or state. Check with the local office in your town to find out the process.
- Set up your Social Media accounts for your business. Use the business name if possible.

Facebook\_\_\_\_\_

Instagram\_\_\_\_\_

Pinterest\_\_\_\_\_

Twitter\_\_\_\_\_

LinkedIn\_\_\_\_\_

- Location of your business \_\_\_\_\_

- Configure your Floor Space - How much do you have to work with?

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- Research for your Embroidery Machine

- Which Embroidery Machine did you or are you going to purchase?
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- Research for your Embroidery Software

- Which Software did you or are you purchasing?
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## Step # 3 - Embroidery Machine & Software

- Learn how to operate your Embroidery Machine-Learn as much as you can from the tech that installed your machine. Write up a Master How to Sheet on the operation of the Control Panel. As you do each step, write it down on a sheet of paper. Take a picture of how the Control Panel looks at each step. Add your instructions into a Word Doc and insert the picture of each step. Print it out and place it in your binder. Save a copy to your computer in a file called Embroidery Machine.
- Install your Embroidery Design Software. Master the basics of your embroidery software. If you have lessons as an option with your purchase, make sure you take advantage of it. There are basics that you need to know to be able to produce embroidery efficiently.
  - Setting up lettering
  - One Line Block & Script
  - 2 Lines Block & Script
  - Arch Lines
  - Lines in a circle
  - Adding lettering to already digitized designs
  - Basic team name setups in a stack to save you time.

I teach Pulse and Wilcom embroidery software. If you do not have anyone to teach you how to do these tasks and even how to edit designs, I have a 5-lesson package that I offer to get you started quickly. Send an email to [joyce@theembroiderycoach.com](mailto:joyce@theembroiderycoach.com) and we can get you set up and scheduled for your lessons.

## Step # 4 - Organize Your Area & Create A Floor Plan

- Do you have your space organized so that you can work efficiently and save time and steps as you move from one process to another?

## Step # 5 - Learn Embroidery Basics

Go to the [“How To Start An Embroidery Business”](#) page in the training center and click on **“Embroidery Basics.”** Go through each module inside of Embroidery Basics and get comfortable with the hooping and learn what types of backings work for each type of fabric.

### Week 1 Lessons - Embroidery Basics

- Setting Up Your Machine**
- Backings & Toppings**
- Needles & Threads**
- Hooping Basics**
- Design Placement**

Watch each one of the videos on each page, then download and print out the documents that are available on those pages. Place them in a binder for easy reference.

Laminate your Placement Charts and Hooping Guides and hang them in your hooping area or tape them down on your hooping table. This will make it easy to be able to check your placement on your garments. If you have the HoopMaster, which I highly recommend, cut out your HoopMaster Settings and attach them to your HoopMaster.

If you are lacking in tools or supplies or do not have the supplies that I recommend, this is a good time to get them ordered. I give you suggestions in my Favorite Backing Recipes for the right backings to order and I even give you the name of a supplier. You will have better results with your embroidery if you use the type of backings & needles that I suggest.

Write down the 3 most important items or shortcuts that you learned in this lesson and what you want to remember.



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**Week 3 Lessons-Maintenance**

- Machine Maintenance
- Quick Tips

Print out your Machine Maintenance Guides and Schedules for your Weekly, 3 Months' and 6 Months' time periods. Place them in your Maintenance Binder and store it under your machine. Print out the Needle Replacement sheet and make sure you have one for each embroidery head. Label it and store that in your Maintenance Binder. Make sure that you go through the maintenance procedures during the Maintenance training and fill out your Needle Replacement Sheet.

Write down the 3 most important items or shortcuts that you learned in this lesson and what you want to remember.

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## Step # 6 - Purchase Other Tools

Download the list of tools that you will need to use to be able to work efficiently. If you do not have the right tools, you will struggle. Inside of the [“How To Start An Embroidery Business”](#) you will have a complete List of Tools with sizes and more specifics. The tools are also listed below. Check off the list as you purchase them.

### Basic Tools

- Work Table**
- Shelving**
- Steamer - Cristal Threads
- 18 Inch Ruler - JoAnn Fabrics
- Marking Pens- Cristal Threads
- Small Flat Soaps
- Scissors- Cristal Threads
- Small Curved Point Scissor- Cristal Threads
- Nippers- Cristal Threads
- 6-inch Bent Tweezers- Cristal Threads
- Top Thread Tension Gauge- Cristal Threads
- Bobbin Tension Gauge- Cristal Threads

### Add On Tools- When you have the funds to purchase

- Hooping Device - HoopMaster- Cristal Threads
- More Hoops - I recommend at least 4 or 6 hoops in the 12 & 15 cm size for your left chest sized design hooping for each machine head. For a single head machine, you need a minimum of 4 of each size. Your Machine supplier
- Peggy’s Stitch Eraser- Cristal Threads

## Step # 7 - Purchase Supplies

Download the list of supplies that you will need to purchase to work with for the different types of products that you will be embroidering. Inside of [“How To Start An Embroidery Business”](#) you will have a complete list of Supplies with sizes and style numbers.

- Basic Supplies
- Thread - Polyester
- Cutaway Backing/Stabilizer
- No Show Backing/stabilizer
- Tearaway Backing/Stabilizer
- Cap Backing/Stabilizer
- Embroidery Topping or Solvy
- Needles
- Bobbins

## Step # 8 - Learn Embroidery Techniques

Go to the [“How To Start An Embroidery Business”](#) page in the training center and click on **“Embroidery Techniques.”**

- Practice embroidery on many different types of garments and other items for family and friends. Get totally comfortable with your embroidery, your embroidery software and your embroidery machine. This is going to help you build up your confidence.
- Post on Social Media pictures of your work.
- Start letting people know you are opening up a business and you will be more than happy to provide them with their personalization needs or whatever your market needs.

### Week 4 Lessons - Embroidery Techniques

- Knit Shirts-Golf Shirts
- Sweatshirts
- T-Shirts
- Difficult Fabrics
- Woven Shirts
- Jackets

I know that this sounds like a lot to do in 1 week, but with the exceptions of a few variations, all of these items are hooped the same. You will be using different backings for the knits than for the woven fabrics, but the methods are going to be fairly close to the same. Pay attention to whether they are Ladies or Men’s garments. The placement will be different.

Watch all of the videos and make sure that you download and print out all of the documents inside of the pages and place them in your Embroidery binder.

Pay attention to the difficult fabrics section. If you are working on Performance Wear garments or garments that have a lot of Lycra in them, you will want to read that before you start hooping your garments.

If you do not work on these types of items but concentrate on Linens, towels and miscellaneous gift items, you may want to skip down to the Week 5 Lessons.

Write down the 3 most important items or shortcuts that you learned in this lesson and what you want to remember.

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## Week 5 Lessons-Embroidery Techniques

- Caps
- Visors

Caps and visors have their own issues. They are not like hooping any other type of items, but once they are mastered, these can be your biggest money makers.

Watch the videos over and over. Practice with different types of caps until you get totally comfortable with hooping. If you have problems with your hands as you are hooping caps you may want to consider investing in the Third



Write down the 3 most important items or shortcuts that you learned in this lesson and what you want to remember.

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## Step # 9 - Set Up Your Office Structure

- Set up your desk area with your computer, a comfortable chair and a printer.

## Phase 2 - Setting Up Your Business Structure

Getting set up for Basic Marketing & Pricing is the beginning of Phase 2. Setting up your Business Structure is going to require a more focused training and guidance than in Phase 1 of getting your business started. You are still building the foundation of your business in phase 2, but here you'll be focusing on setting up your business for efficiency and smooth productivity.

I have a Set of Business Tools, [Essential Tools for Embroidery Business Growth](#), that is going to get you set up properly to run your business efficiently. The price of the entire package is more than 50% less than purchasing each product alone. With this package, I also include a bonus of Marketing 101 because you have purchased the “**How To Start An Embroidery Business**” Program! Inside of this package are your:

- Business Forms
- Sales Tools
- How to Price Embroidery
- Embroidery Business Bookkeeping System
- Embroidery Scheduling & Production Tracking System
- Plus, Marketing 101

## Step # 10 - Set Up Your Business Forms and Create Your Ordering & Production Systems

- Watch the videos on Ordering Systems and Production Flow
- Download all of the forms that you will need for your business.
- Watch the video on Learning How to Work with Spreadsheets to show you how to add your business name and logo to the heading of each of the forms.
- Add your business name and information to the headings of each one.
- If you have some inventory on hand, create an inventory spreadsheet and list all of your inventory items on the spreadsheet

## Step # 11- Create Your Marketing Materials

Watch all of the videos in Marketing 101

- Decide which methods of low cost marketing you are going to work with to get the word out about your products and services.
- Create your marketing pieces such as business card and brochure
- Download the Planning pages for your Marketing Plan.
- Create your marketing plan to start your marketing in the right direction to your market.

## Step # 12 - Create Sales Tools

Watch the videos inside of the program, Sales Tools and learn how to create your Sales Tools. These sales tools are going to make it easy to wait

on customers and decrease the time that you will need to spend with them as they are making their decision.

- Thread Chart
- Basic Layout Style Sheets
- Font Selection
- Quoting Tools
- Hang Tags

## Step # 13 - Create Your Price List

Watch the videos inside of the program, ‘How To Price Embroidery’ to learn how to start timing all of your jobs and create your Pricing Structure.

- Download all of your forms
- Fill in your Expense Spread Sheets
- Download your Pricing Structure Workbook
- Follow the system and create your Pricing Structure
- Create your Price Lists for each customer type
- Make sure you understand the Quoting System

## Step # 14 - Setting Up Your Bookkeeping System

- Purchase QuickBooks-I recommend QuickBooks on line. Which level to start with, that depends on where you are in your business at the current level. I recommend that you start with **Essentials**, especially if you are working with a bookkeeper. Your accountant can also have access to it when he or she needs to do your taxes.
- Watch all of the videos in the **Embroidery Business Bookkeeping System**.
- Set up your Chart of Accounts based on the “Chart of Accounts” Spreadsheet that I give you.
- Download the sample forms for Importing your Customers, Vendors and Products and Services.
- Follow the system inside of the program and finish getting your QuickBooks set up properly for the Decorating Apparel Industry.

## Step # 15 - Start Marketing Your Business

- Join the local Chamber of Commerce or other Networking Organization and start networking to let everyone know that you are in business and ready for business.
- Think about adding a website to your business. People want to check you out before they start doing business with you. Social media will work to get started. Do not rush into a website, just start planning for it when you are ready!

### What's Next

For personal help to get your business started quickly or help get your business organized, please contact me at [joyce@theembroiderycoach.com](mailto:joyce@theembroiderycoach.com). I have more programs and a training center that will help you with a quick start at whatever level you are currently in your business!

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