CALENDAR

the top typeS of Productivity Tools

To Rock Your Coaching Business



|  |  |
| --- | --- |
| **Week 1** | |
| **Monday** | |
| **AM**   1. Organize and de-clutter your office. 2. Clean your desk. Get rid of anything that doesn’t have a purpose. 3. Take your completed Worksheet, and use it as a checklist to set up your new productivity systems. Read through it. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Tuesday** | |
| **AM**   1. Decide whether or not you are going to use some form of email inbox organizing tool or extension such as ActiveInbox.  * If yes, install. Spend the rest of this session familiarizing yourself with it and cleaning up your inbox. * If no, clean out your inbox.  1. Clean up your desktop and organize your files. 2. Decide whether or not you need to spend at least three days tracking and recording your habits.  * If yes, install an app such as Coach.me’s free Habit Tracker app. * If no, skip to next week. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Wednesday** | |
| **AM**   1. If you have decided to set up a coaching-in-a-box system or new scheduling software, close all other applications. 2. Sign up and/or purchase and install your chosen all-in-one solution. 3. Spend the rest of this session setting up your new software or system - create client intake forms, customize it with your logo and colors, and be sure to watch all videos, read all FAQs and work your way through any wizards and tutorials. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Thursday** | |
| **AM**   1. Familiarize yourself with your new scheduling system. 2. Create emails and Facebook Page posts, letting your fans and subscribers know you have an exciting new way for them to schedule calls and interact with you. 3. Before you send these out, have your VA or a couple of trusted clients or peers ‘test’ your new intake procedure, to make sure it runs smoothly (and find any errors!) | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Friday** | |
| **AM**   1. Review your week so far.  * Are there any tasks left undone? (If so, finish them!) * Brush up on any areas of any new productivity systems or tools you need to review.  1. If you have been tracking your habits, analyze the results. Come up with a plan for correcting any habit that needs to be corrected. Make a firm commitment to your new solution.   (Example: “I will get up two hours earlier every morning” or “I will install Rescue Time and block myself from Facebook until 2 p.m. every day”.   1. Get your office (and Monday To-Do list) all set up for next week. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Week 2** | |
| **Monday** | |
| **AM**   1. Explore Google Apps. Decide where they fit in with your coaching business. 2. Take a look at your forms.   Do you have all the forms you need?  Do any forms still have to be revised? Created?   1. Decide on your best and easiest type of form creation method or tool, and catch them all up to date. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Tuesday** | |
| **AM**   1. Proof the forms you created yesterday. 2. Revise as needed. 3. Test them out on your beta helpers. | **PM**  **Coach clients** |
| **Wednesday** | |
| **AM**   1. Sign up for and install the call recording option or system you decided on when doing your worksheet research. 2. Spend the session exploring its features. 3. Schedule your first appointment using the new system or software. (If you prefer, test it out on one of your beta helpers.) | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Thursday** | |
| **AM**   1. Set up your new file sharing system or tool. 2. Brand it with your colors, logo, etc., if it is brandable. 3. Write or record instructions for its use and proof. 4. Distribute instructions to:  * Clients * Team members  1. Put a copy in your office manual. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Friday** | |
| **AM**   1. Review your week.  * Finish any tasks left undone * Deal with any feedback on your new tools, forms or systems  1. Ready your office and itinerary for next week. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Week 3** | |
| **Monday** | |
| **AM**   1. Sign up for and install any other productivity tools that caught your interest. (These should be noted in your worksheet.) 2. Familiarize yourself with them. Work your way through any tutorials, FAQs and videos. 3. Begin using them. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Tuesday** | |
| **AM**   1. If you have not already done so, sync your Google Analytics with relevant new tools that allow this. 2. Check with your beta helpers to ensure everything is running smoothly. Encourage them to share:  * What they like about your new system * What they don’t like or feel needs tweaking * Any suggestions they have for making your systems more easy to use | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Wednesday** | |
| **AM**   1. Install or re-install your tracking tool and begin tracking your time again. 2. Spend the rest of your session writing emails and a newsletter to upload for clients and subscribers. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Thursday** | |
| **AM**   1. Proof the emails you wrote yesterday. 2. Set them up in your autoresponders. 3. Spend the remainder of your session re-exploring at least one of your new tools or systems.  * Are there any features that are new to you? If so, will they be helpful? How can you put them to use? | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Friday** | |
| **AM**   1. Review your week. 2. Prepare your office and itinerary for next week by:  * Assessing how well your new systems and tools are working for you * Finding or listing any new tools you want to check out * Making revisions | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Week 4** | |
| **Monday** | |
| **AM**   1. Explore, sign up for and install any new tools or accessories you need for your productivity systems. 2. Decide how you wish to make the most of your new tools and systems by planning to repurpose or create content it allows you to record, collect or note. 3. Create a schedule for your content creation or repurposing. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Tuesday** | |
| **AM**   1. Analyze the results of last week’s tracking. 2. Decide:  * If your new tools, forms and systems have improved productivity * Where you could improve productivity even more | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Wednesday** | |
| **AM**   1. Make a list of any new items you need for your office (e.g. new file folders). 2. Update your office manual with copies of any new forms, or style/production guide sheets and or/instructions that have resulted from your new productivity routines. 3. If you have not yet created a Master Business Manual (your office manual), create one! | **PM**  **Coach clients** |
| **Thursday** | |
| **AM**   1. Go over your office systems and decide if there is any other area of your business that you need to update and/or find a new tool to handle (e.g. new accounting software or system). 2. Set up and install any new tool or system 3. Cancel any free trials that did not work out for you. | **PM**  **Coach clients** |

|  |  |
| --- | --- |
| **Friday** | |
| **AM**   1. Review your month’s productivity tool overhaul. Perform any tasks left undone. 2. Make a commitment to maintaining new productivity habits. 3. Plan your business for next month and enjoy the results of your increased productivity! | **PM**  **Coach clients** |