

HOW TO GET ORGANIZED



WHAT: This training is about organizing your days, weeks, and months to be more effective and efficient so that you increase your results.

GOAL: Save 5 to 8 hours a week and increase your business confidence because you have a plan and a process.

growth
GETTERS

where are you?

THINK ABOUT A TYPICAL DAY. IS IT RUNNING ON A PLAN OR A PRAYER? WHY?

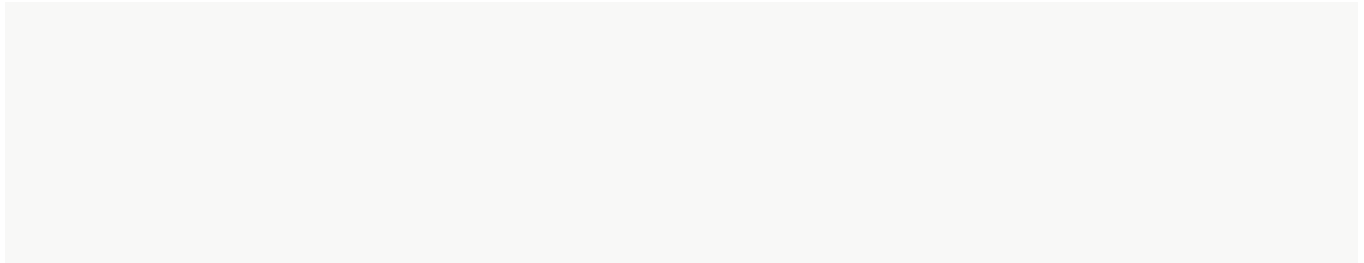


WHAT DOES AN IDEAL DAY LOOK LIKE FOR YOU?

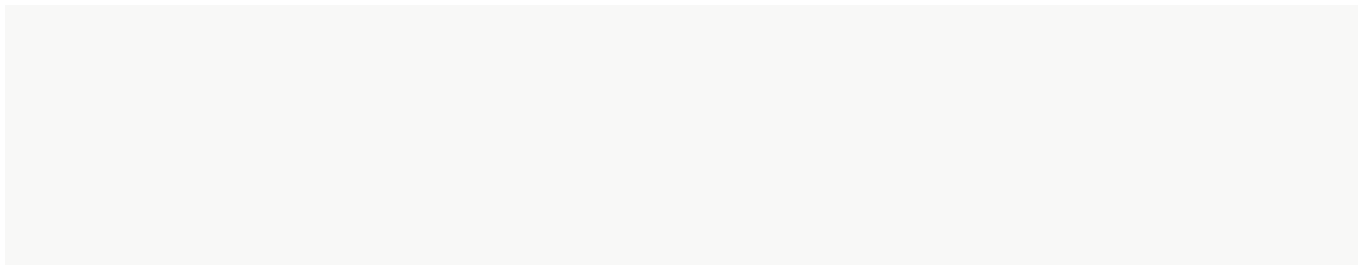


areas you want to organize

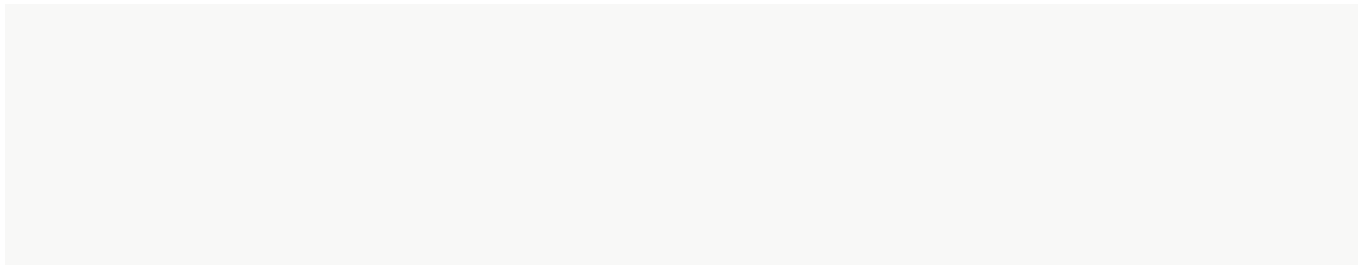
AREA & WHY



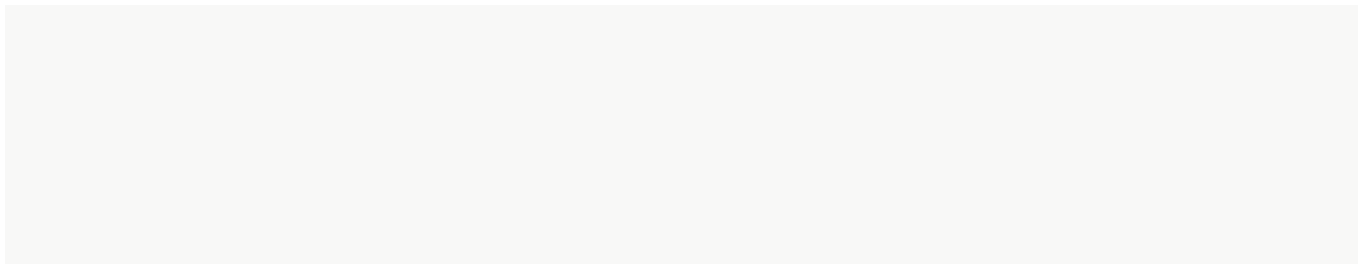
AREA & WHY



AREA & WHY



AREA & WHY



brain dump

WHAT ARE COMMON TASKS IN EACH AREA THAT COULD BE ORGANIZED?

FINANCES

MARKETING

SALES

HUMAN RESOURCES (TEAM)

CUSTOMER RELATIONSHIPS

PRODUCT & SERVICES

PROJECT MANAGEMENT

SOCIAL MEDIA

CONTENT CREATION

areas you want to organize

AREA & WHY

A large, empty rectangular box with a light gray background, intended for writing notes related to the first area.

AREA & WHY

A large, empty rectangular box with a light gray background, intended for writing notes related to the second area.

AREA & WHY

A large, empty rectangular box with a light gray background, intended for writing notes related to the third area.

AREA & WHY

A large, empty rectangular box with a light gray background, intended for writing notes related to the fourth area.

departments

FINANCES

RESPONSIBILITIES:

SALES

RESPONSIBILITIES:

MARKETING

RESPONSIBILITIES:

CUSTOMER RELATIONS

RESPONSIBILITIES:

departments

RESPONSIBILITIES:

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departments

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The Daily Checklist

Big Goal Reviewed (GG Success Foundations - pg. 12)

Count Blessings

Affirmations Claimed

Choose Your Appreciation Person

Set Your Daily Five

Marketing Block

Power Hour

Follow Up with Potential Leads/Clients

The Weekly Checklist

Update/Review Scheduling Calendar

Review Projects (block, schedule, complete)

Growth Hours (schedule time for growth & drop in a questions for Growth Hour)

Set Office Hours (*from GG High-Performance Habits* and post on door)

Home Plan (meal plan, order groceries, schedule date night, etc.)

Content Creation (blog, social, newsletter)

Office/Desktop — Clean up & archive

Check in with your team

The Monthly Checklist

Check-in Call with your Accountability Coach!

Review Finances (input or review costs, pay bills, run reports, check P&L)

Review Most Recent GG Assessment & Whole Living Growth Plan (*inside GG High-Performance Habits*)

Plan/Review Next Month's Goals

Record Metrics (size of newsletter lists, social media accounts, Pinterest, website views, podcast, etc.)

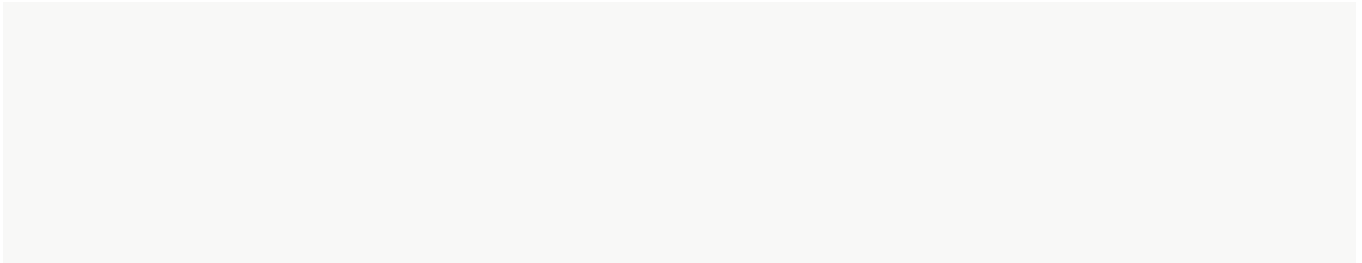
Review Marketing Initiatives

Reach Out to Last Month's Clients/Customers for Testimonials

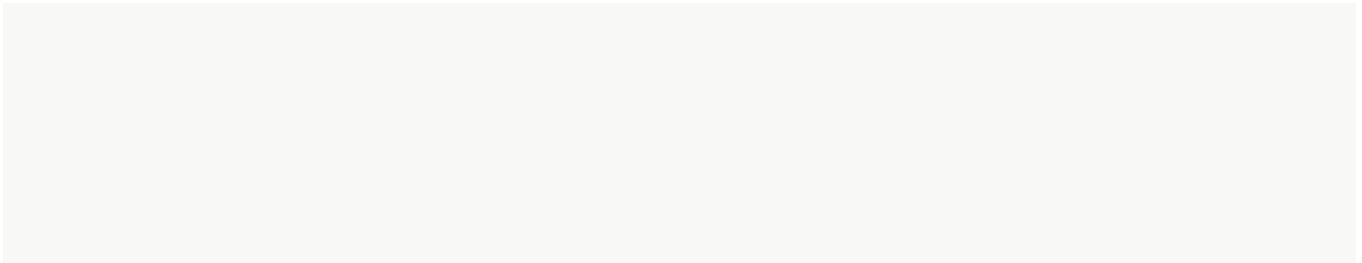
Check-In with Yourself

Quarterly Map

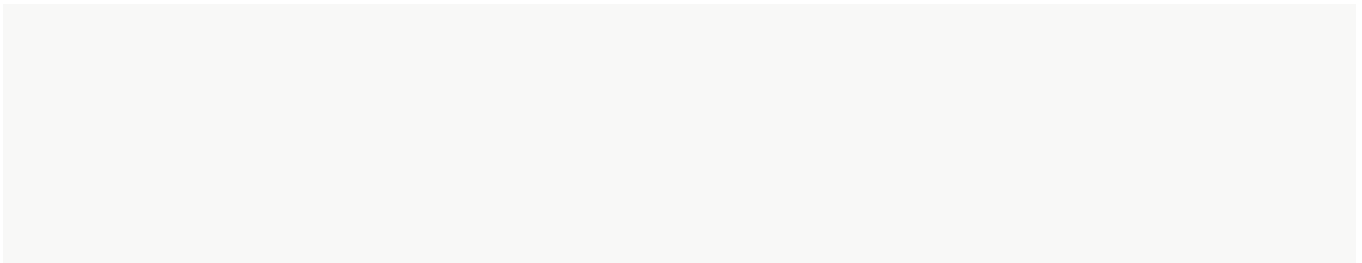
QUARTER 1 (JAN-MARCH)



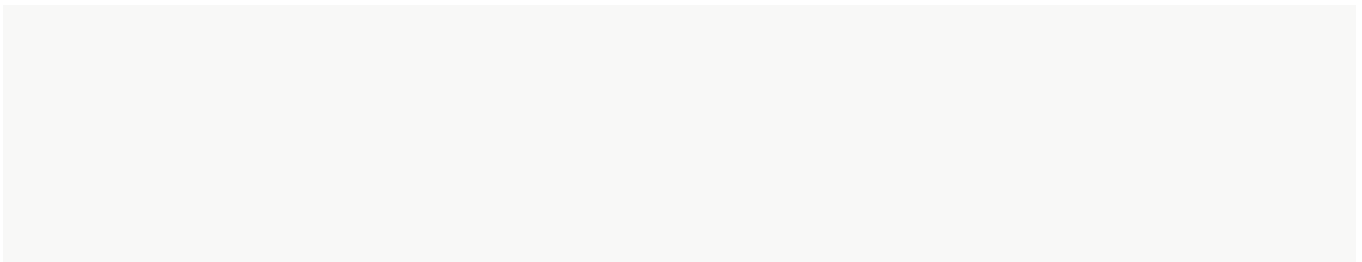
QUARTER 2 (APRIL - JUNE)



QUARTER 3 (JULY-SEPT)



QUARTER 4 (OCT-DEC)



"Hiring" BOB

Best Operations Breakdown

AREAS BOB CAN HELP:

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**what do
we live for,
if not
to make
life less
difficult?**

GEORGE ELIOT

Resources



Loom — What I use to make screen-recorded training videos for my team and to create BOBs

Google Doc — For sharing projects/BOBs with team

Dropbox — For sharing documents, files, graphics with my team and clients

Clickup, Asana, Monday, Trello — All are project management apps. Take a peek and see what might work for you.

Book — Systemology by David Jenyns