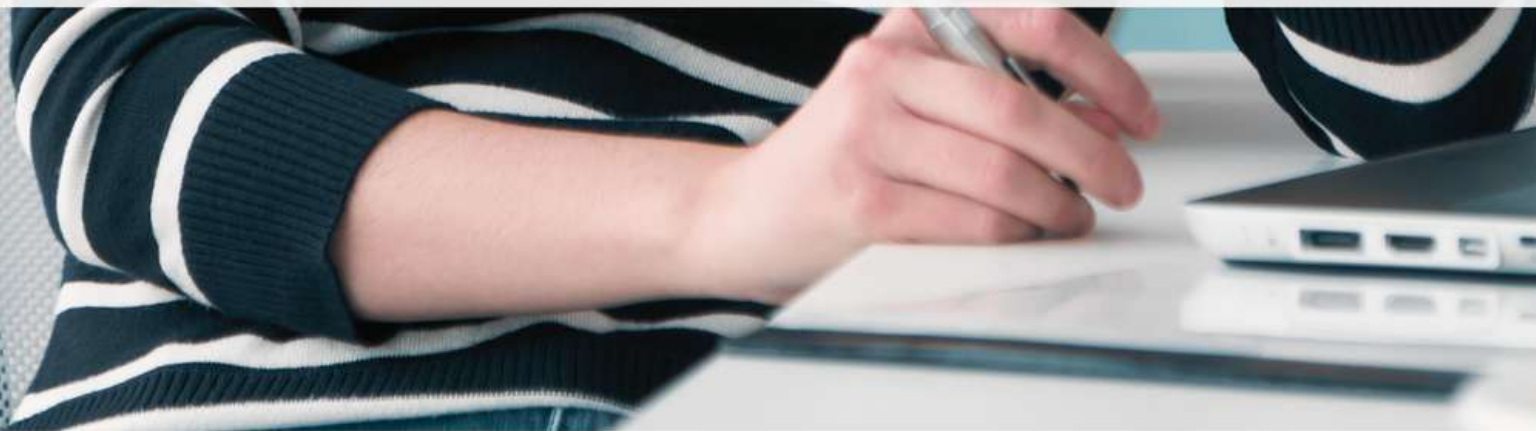# STREAMLINE YOUR DAY

The Ultimate Guide to Boss-Level Organization!

Welcome

This workbook shows you how to organize your day to achieve maximum results in your business. Learning how to effectively plan your day is crucial to curb overwhelm while building and creating the business of your dreams.

We all know that successful business owners know how to plan. They plan their schedules, tasks, and commitments with an eye toward continued business growth. That's what you need to do, too.

Whether you already consider yourself an avid planner or know you need to brush up on the skill, this guide has you covered.

As you go through the six steps, you may feel some resistance to changing your current routine or schedule. This is completely normal. But you are reading this now because you know something needs to change. It's time to try something new!

This guide takes a fresh look at organizing your day by highlighting the importance of using energy flow to achieve more in less time. Additionally, we dive deep into your current daily tasks to make sure you're focusing primarily on money-making activities.

Once you complete this workbook, you'll have a clear idea of how to increase your productivity though planning your daily schedule. You'll also know what tasks you need to focus on to increase revenue and grow your business.

Let's get started!

Step 1: Uncover Your Workflow

The first step in organizing your day is to uncover your workflow. Workflow is the movement and way you perform tasks. It is basically what you do in your business and when.

Finding a workflow that fits your schedule and energy needs increases the number of activities you can complete in the same amount of time. By determining how your time and energy can best be used, you can do more in less time.

The key to using workflow to your advantage is creating a system that is simple and easy for you to stick with every day. So instead of sitting down to work each day and determining what needs to be done that day, you plan ahead to maximize your focused energy.

Of course, there will always be days when things come up, or your schedule needs to change. That's normal and expected. However, with a workflow system in place, you can quickly get back to your regular routine.

Two popular workflow systems that increase productivity while decreasing overwhelm is batching and energy-focused work.

Both workflow systems are discussed in detail below. You decide which fits better with your personal preference and style, or merge the two to create a unique workflow system.

Batching

Batching is when you segment a group of similar activities and do them all at once. This system works because it saves time, maximizes your focused energy, and simplifies task completion.

For example, it's common for bloggers to batch write their blog posts. Instead of writing three blog posts on three different days of the week, you'd write all three on Monday. Or a coach who blogs once per week may batch write two or three blogs at a time.

One of the main benefits of batching blogs (or any other activity) is that you have a specific, pre-determined time to focus only on that type of task. You're not switching between creating a blog post, doing accounting activities, or having client calls.

Batching reduces the mental back-and-forth required when moving between different tasks.

Another valuable aspect of batching is you feel more flow in your work. Flow makes work feel easy and decreases distractions.

And lastly, when you batch your work, you don't have to think about what you need to do each day when you sit down to work. You already know.

Most business activities can be batched. Common tasks business owners batch include:

- Client calls
- Returning emails
- Writing blog posts
- Editing blog posts
- Making videos
- Accounting
- Bookkeeping
- Administrative work
- Creative work
- Planning
- Researching

Here's an example of how a coach who works predominately with 1-on-1 clients might batch work: content creation on Mondays, video recording on Tuesdays, client meetings on Wednesdays, administrative work on Thursdays, and client meetings on Fridays.

Keep in mind that you can batch in whatever way works for you. For example, you can be more specific with your batching schedule and segment mornings versus afternoons. You can also divide your batching tasks any way you'd like.

There is no required way to batch your work. Batch in the way that works best for you!

The main point is to divide your weekly business tasks into similar categories and determine when you want to do each per week.

Energy-Focused Work

The second popular method to organize your day is to segment activities based on the energy level and focus required to perform the tasks.

To keep this simple, it is easiest to think in terms of high-energy tasks and low-energy tasks.

For example, responding to emails and other administrative activities would be low-energy work. On the other hand, writing an article or designing a new course typically requires a high level of energy and focus.

It's the higher-energy work, also known as "deep work," where we create more, increase productivity, and achieve the desired results in our business.

In his book, *Deep Work*, Cal Newport says deep work requires complete focus and total concentration. When we are engaged in deep work, our creative and analytical abilities are pushed to their limit, and we produce our best stuff.

The problem is that many of us spend too much time doing low-energy work. Responding to emails and filing papers may feel productive, but they probably won't help you reach your business goals.

Since deep work requires our full focus and energy, it's crucial we schedule these tasks when we have the most energy in the day. For example, deep work in the mornings when you're fresh and energetic, low-energy work after lunch, and administrative work in the late afternoons.

An energy-focused workflow can leave the "what" you do during your high and low energy times flexible depending on what's going on in your business each day. You could also merge both the energy workflow and batching systems to create a tighter, less flexible schedule. It's up to you!

The key to using batching and energy-based workflow systems is to harness your focus, energy, and time in the best possible way.

The worksheets on the following pages will help you uncover how to create a daily schedule by incorporating batching and/or an energy-focused workflow.

Worksheet: Batching

Draft a list of activities in your business you can start batching. In the second column include when you will work on those tasks.

Task to Batch	Day to Complete

Worksheet: Energy-Focused Work

Answer the questions below to create an energy-focused workflow schedule.

1. **Which activities in your business require you to have high energy?**

2. **Which activities in your business require less energy from you?**

3. **How does your energy fluctuate throughout the day? (For example, some people have more energy first thing in the morning and others at night.)**

Worksheet: Energy-focused Workflow (cont.)

4. **Are there any other factors you need to consider before determining your energy-focused schedule? (For example, children's daycare or school schedules or regular obligations during the highest-energy part of your day.)**

5. **Based on your answers to questions 3 and 4, when will you focus on higher-energy work (aka deep work) each day?**

6. **Based on your answers to questions 3 and 4, when will you focus on lower-energy work each day?**

Step 2: Map Out Your Schedule

Now that you've created a more efficient workflow routine, it's time to map out your schedule. This step is necessary to show you exactly how much available time you will have each day for your business.

Daily Schedule

There are many items that can affect the amount of time you have available to work each day. As you think about your personal schedule and commitments, consider the following:

- What time will you be in the office each day and what time will you "clock out?"
- How much time do you need for lunch and/or mini breaks?
- Do you have any daily or weekly non-negotiable commitments, such as dropping kids off at school, walking the dog, or a weekly exercise class?

Special Events

In addition to determining your daily schedule, you should look ahead to upcoming appointments and hard deadlines.

When you're driving a car, you can't only pay attention to what's right in front of you. You also need to be watching a few hundred feet ahead so you can anticipate any upcoming issues.

The same goes for managing your day. You need to look ahead to the next week or two so you can plan for any potential conflicts.

You should also account for any long-term business commitments. For example, do you attend a networking breakfast every third Friday of the month or a bi-weekly professional development lunch? Now is the time to consider these commitments as you map out your day.

Get in the habit of blocking off these times from your calendar. While you may be technically working, you aren't available during these times to do other business-related tasks.

Knowing these commitments ahead of time and making sure they are in your calendar will help as you plan your days and look ahead each week or two.

Use the following worksheet to determine your daily and special event schedule.

Worksheet: Map Out Your Schedule

Answer the questions below to determine your daily work schedule.

1. **What time will you be in the office, and when will you stop working each day?**

2. **How long do you take for lunch and other breaks throughout the day?**

3. **Do you have any non-negotiable daily commitments that will influence your schedule and availability (e.g., dropping your kids off at school or walking the dog)?**

Worksheet: Map Out Your Schedule (cont.)

4. **Do you have any regular weekly or monthly commitments you need to account for in your calendar?**

[ ]

5. **Do you have any upcoming appointments or hard deadlines to include in your planning?**

[ ]

Note: Be sure and block off these times in your calendar!

Step 3: Organize Your Daily Tasks Into 3 Categories

Steps 1 and 2 examined your daily and weekly schedule in detail. Step 3 clarified what tasks you perform every day. With this information, you can start focusing your available work time on the most critical tasks for your business.

Your daily tasks come in three varieties: direct money-making, indirect money-making, and non-money-making. It's essential to become aware of how much time you spend on each.

Direct Money-Making

Direct money-making tasks are activities that directly result in revenue.

Essentially, money-making tasks are when you offer something specific to a receptive person or group of people.

Sending an offer email to your list is a direct money-making task. Hit the send button, and (assuming your list is responsive) money will come in.

Other direct money-making tasks include pitching a potential client, launching a product, promoting a specific product or service via social media, setting up a sales page with a buy button, and hosting a webinar (or other content-based promotion) where you include an offer to buy something.

The main money-making tasks for your business will vary. However, remember that doing them will immediately earn you money.

Indirect Money-Making

Indirect money-making tasks typically focus on building relationships with customers or potential customers. These tasks are needed to grow your business and increase the amount of money you earn when you perform them.

For example, posting to your blog is an indirect money-making task. It will bring traffic and potential clients, but not immediately (unless you include a specific offer).

Other indirect money-making activities include:
- Strategic social media posting
- Commenting on other people's blogs
- Doing interviews
- Tweaking your website copy to increase conversions
- Hosting a podcast
- Mapping out a marketing plan or business strategy
- Connecting with other brands in your niche
- Researching and studying your business or area of expertise
- Networking (both in person and online)

The key difference between direct and indirect money-making tasks is *when you see results*. Direct money-making tasks lead to immediate revenue. Indirect money-making tasks will grow your business and improve your brand awareness, but money will not be received immediately.

Don't forget, that indirect money-making tasks help increase revenue in the long run and are essential for your money-making tasks to be received by a willing audience.

Non-Money-Making

Non-money-making tasks are required for you to run your business smoothly and stay in good standing legally. Unfortunately, they don't earn you any money.

Some of the common non-money-making tasks include administrative activities, bookkeeping, site updates, accounting, and doing your taxes. These are the tasks many business owners feel overwhelmed trying to keep up with. And while they are necessary for your business, they shouldn't eat up too much of your available work time.

Use the worksheet on the following page to log your business activities for a few days. This exercise will help you see exactly what you're working on and for how long.

Once you have listed a variety of activities, categorize each task as either direct money-making (direct MM), indirect money-making (indirect MM), or non-money-making (non-MM). Make sure you categorize each item before moving onto step 4.

Daily Task Log

Task	Time Spent on the Task	Type of Task (Direct MM, Indirect MM, or Non-MM)

Step 4: Calendar Your Money-Making Tasks

Once you've kept a log of your business activities and categorized each (as outlined in step 3), you should clearly see what activities directly and indirectly make your business money.

Money-making tasks (both direct and indirect) are the most important work you can do. They deserve top priority in your calendar.

Get in the habit of starting each day with a money-making task. No matter what else happens throughout the day, you've done one thing to help grow your business.

Remember, long-term, sustainable business growth typically occurs one step at a time. There isn't one specific thing you should do each day to earn more money in your business. Instead, you must consistently perform money-making tasks.

The actual money-making tasks you do each day will change depending on your business model and current goals. We'll discuss this more in the next step, so don't feel overwhelmed if you have a long list of money-making tasks and aren't sure which ones to focus on.

The main takeaway from this step is to get in the habit of regularly and consistently doing money-making tasks in your business. This is how your business will grow.

Block off the time that you are most energetic and creative, and knock those money-making tasks off your list.

Use the worksheet on the following page to determine when you want to work on money-making tasks each day.

Worksheet: Calendar Your Money-Making Tasks

Answer the following questions to determine when will complete your money-making tasks.

1. **What time of the day are you committed to working on money-making tasks? (Block this time off on your calendar!)**

2. **Do you foresee any obstacles keeping you from honoring this commitment to yourself?**

3. **If you answered yes to the previous question, what can you do to prevent the obstacle(s) from interfering with you regularly completing money-making tasks?**

Step 5: Rank Your Money Tasks & Prioritize

You now have a list of money-making tasks and have blocked off time on your calendar to focus on them. However, simply having a list of important tasks won't be super helpful - especially if that list is long (and it probably is).

Step 5 will help you decide what's important right now.

You need to consider your unique business and landscape to determine which money-making tasks are most relevant for your business right now.

For example, if your email subscribers feel neglected because you haven't mailed them in a week, then this is likely your most important task.

On the other hand, if all that's standing between you and your next product launch is a sales page, then you need to prioritize getting that done.

If you've been procrastinating creating your first product and it's a major goal you have for your business, then this needs to be completed.

While you likely won't be able to fit all your money-making tasks in your schedule, ranking them is necessary to help you decide which are most important and deserve your attention. Remember, you don't have to do all of them now. And you don't have to do everything by yourself.

Use the worksheet on the following page to rank your money-making tasks in order of importance. Don't be shy about writing each task; that's how they will eventually get done.

Once you have your tasks listed and ranked, estimate how much time each will take and plan them into your schedule accordingly.

Worksheet: Ranking Money-Making Tasks

List your money-making tasks in order of importance and estimate how long each task will take to complete.

Money-Making Tasks (From most important to least important)	Estimated Time to Complete

Note: The ranking of your tasks will change throughout the year. You can always go back and rework your rankings a few times a year or as often as you see fit.

Step 6: Outsource the Rest

After working through steps 1 through 5, you should have a daily schedule set and know which money-making tasks you will prioritize in your business right now.

However, we haven't talked much about your non-money-making tasks. They are necessary, but don't help you increase your revenue.

No business can run for long if the administrative work isn't getting done. But when you properly prioritize your money-making tasks, you might find that you have less time to devote to bookkeeping, website updates, funnel creation, and other important but not profitable work. These are the very tasks you should be outsourcing.

You might have also determined you don't have enough time to do all the money-making tasks that will help you achieve your business goals. If that's the case, you should also consider hiring out those tasks, too.

If you are new to hiring contractors, you may want to start with someone to help with administrative work. As your business (and contractor budget) grows, you can begin hiring out other tasks.

Don't forget, your time and energy are valuable. Once you start contracting some of your business tasks, you'll likely see how much it helps your business grow. At the same time, you'll have more availability to focus on other activities in your business.

Use the table on the following page to make a list of possible administrative and/or money-making tasks you'd like to have performed by contractors. The worksheet includes space to include the budget for each task.

Once you have this set, start handing this work off to trusted contractors!

Worksheet: Tasks to Outsource

List the tasks you don't have the time or desire to perform. Include the allotted budget for each task.

Possible Tasks to Outsource	Budget

Note: If you are new to outsourcing, start with just one of these listed tasks. You can always outsource more as you feel confident hiring contractors and your business (and budget) grows.

And that's a wrap…

Congratulations on completing this workbook! By organizing your day effectively and efficiently, you have taken a massive step toward increasing your business success (and probably your sanity!).

You now have the skills and resources to create a workflow system that best utilizes your time and energy. Additionally, you have clarified your work availability and commitments, determined how to fit money-making tasks into your schedule on a regular basis, and created a plan to hire out the tasks you don't have the time or desire to do.

As your life schedule and business goals change, continue to rely on the tools and worksheets in this guide to help organize your day. The central premise is the same: **Use your time and energy wisely.**

I hope you start implementing your new schedule immediately and quickly see positive results. While changing our schedules and routines can sometimes be difficult, it is often required to up-level our business and growth. I know you can do it!

To your success,

Stacey