

Structure Creates Freedom

From "A to D": Your annual goals to your daily tasks. Without structure, a month goes by and you've not made progress.

 by **Debra Atkinson**





Why Proper Measurement Matters

1

Clarity

Clear direction for business activities based on **outcome not on effort.**

2

Focus

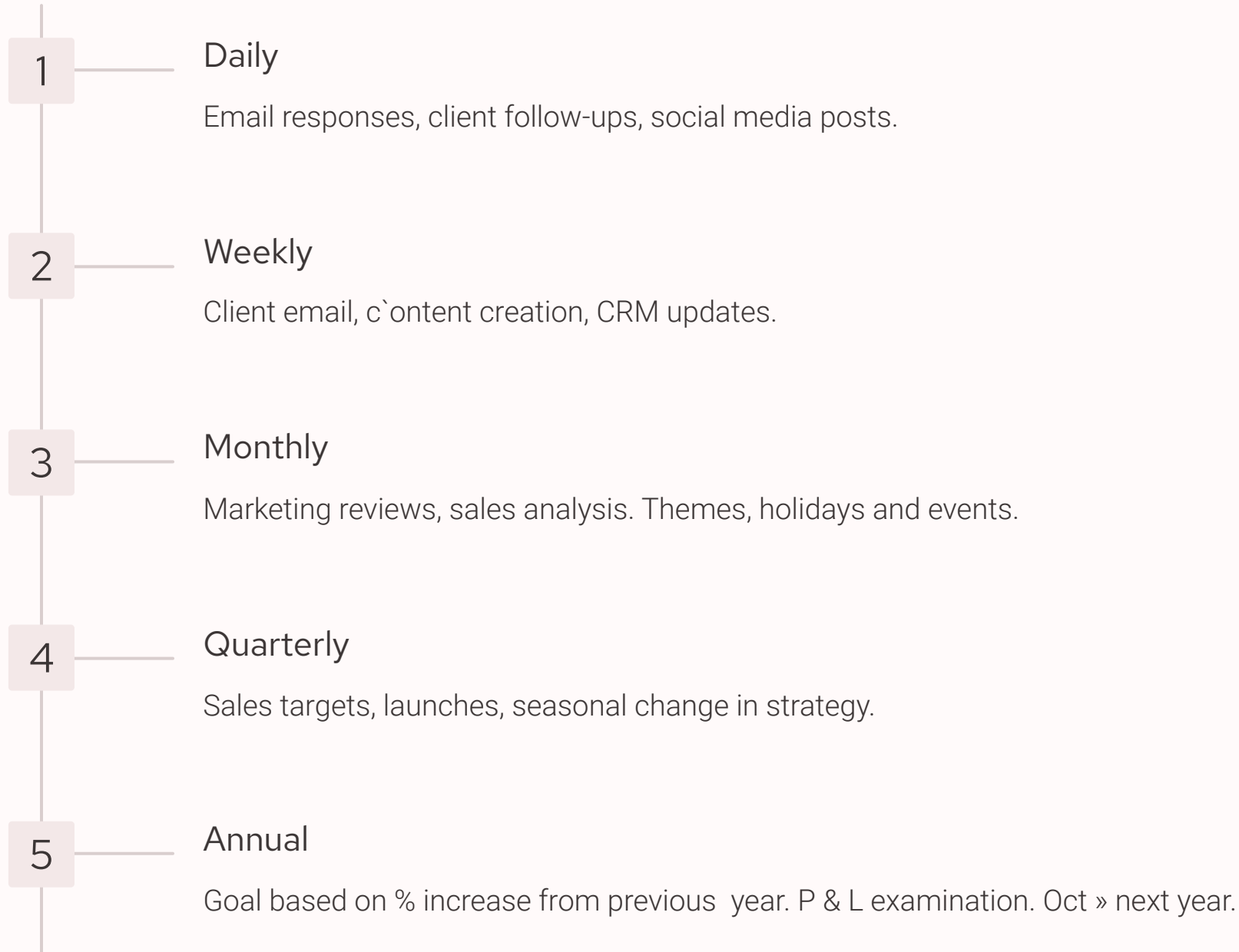
Concentrate on **important tasks vs being "busy"**

3

Progress

Measurable advancement towards goals.

Task Types Overview



Task Benefits ...

Daily

Routine, consistency, momentum.
End busy work and distraction. Set
up blocks of time. Create
dependable time in your creative
zone.

Weekly

Consistency and strategy focused
on the important outcomes. Effort
vs Outcome becomes clear.

Monthly

Analysis and adjustment. Every
1/12 of your year matters. A
business model may have highs
and lows or may have consistent
revenue.

Task Benefits

Quarterly

Big measures reveal monthly and weekly success. One-fourth of the year opens conversation for change.

Semi Annually

Are systems working? Are the right people in the right seats?

Annually

Year-over-year goals, actual, and projections. Set the pace for monthly and weekly actions.

Task Tracker Setup

Task Name	Frequency	Priority
Due Date	Assigned	Status

Use tools like Basecamp, Trello or Asana to set up actual task. This G-Doc to stay on top of tasks:

https://docs.google.com/spreadsheets/d/1hm8cjglPsk2osxeTFalHAXT3k_FbeiTmHGOYA96o8fM/edit?usp=sharing Copy and make it yours.

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Example Workflows

1

Daily

Create blog or video for marketing on social and in email.
Call a new lead. Conduct current client calls or groups.

2

Weekly - Monday and Friday

Set week's priorities, place in calendar, complete tasks,
track sales, leads, traffic.

3

Monthly - last day of

Analyze and adjust strategies. M-o-M. e.g. revenue actual
vs goal, YT growth

4

Quarterly

Evaluate overall progress to year. Project & strategize to hit
goals. Each 12-week program compared to another -#
registrants/# conversions/what got them there



Metrics to Track



Daily

Emails sent, calls made. Team communications. Projects assigned.
Blocked time for project progress.



Weekly

Sales, content engagement, new leads. Appointments booked.
Appointments conducted. Project completion.



Monthly

Revenue status, conversion rates. (Google analytics, social platforms, email subscribers, open rates)



Quarterly

Sales targets, ROI on social, email campaigns, speaking.





Best Practices and Next Steps

Assess Your Numbers

What's working? What's not? What's your action?

Prioritize Your Time

Spend time on high priority revenue & lead gen.

Set Variables to Change and Measure

Review every day/week/month.

Implement the Template

Copy template, identify tasks, start tracking.

Task Name	Frequency	Priority	Due Date	Assigned To	Status
	Daily	High	Sunday, November 3, 2024	Self/EA	ongoing
responded to	Daily	Mid		Self	ongoing
Task Name	Frequency	Priority	Due Date	Assigned To	Status
Inbox to zero	Daily	High	Sunday, November 3, 2024	Self/EA	ongoing
Slack messages responded to	Daily	Mid		Self	ongoing
Project time in calendar	Daily	Low		Self/EA	
Team meeting	Weekly	Mid		Team	
Manager/department meetings	Weekly	Mid		Self	
Organic platform content plan	Monthly	High		Self/Julie/Missy	
Content creation or delegation	Monthly	High		Debra/Julie/Missy	
Lead magnet performance assessment	Weekly	High		Anthony	
Email subscriber stats	Weekly	High		Anthony	
Daily client attraction	Daily	High		Self	ongoing
Monthly Revenue Goal-Actual	Monthly	High	1st of each month	Self	
Annual launch calendar plan	Yearly	High	Saturday, November 9, 2024	Self	pending
12-week program launches error free	Quarterly	High		Anthony	
New 12 week program plan, video,	Yearly	High	March 15 and Sept 15		
h launches error free	Quarterly	High		Anthony	
gram plan, video,	Yearly	High	March 15 and Sept 15		

Q & A

Lead a team even if you are the team. Have a P & L meeting, a sales team meeting, a marketing meeting, and content creation meeting. Review the copy and graphics on website, in social, and in email. Would you hire you/them again? What needs to change? Plan launches with content release dates and the effectiveness of it.

