

Brain Dump the To-Dos

Write down everything I need to do, even if I can't get to it today.

The Top 3 Things for Today

My Frog to Eat Today

Self Care (Not Optional!)

Recurring Daily Tasks

Contacts & Clients

Respond to all new inquiries.

Add new inquiries to tracking system.

Follow up with open inquiries.

Update inquiry tracking system.

Zero inbox: respond to emails, phone calls or text messages.

Send thank you cards for interviews or referrals.

Record any mileage driven for business purposes.

Facebook

Newsfeed: comment on or like at least 5 posts.

Reply or like comments on posts on my page.

Post 2-4 times per day, at least two hours apart.

Scan my interest lists for content, add to queue.

Pinterest

Create at least 5 pins from things found around the web.

Repin at least 5 pins from other people on Pinterest.

General Marketing

Post useful content to Twitter, LinkedIn, Instagram, etc.

Write: blog posts, curriculum, website content, etc.

Monitor pay-per click campaigns.

Other Tasks

Month:

Administration & Accounting	WK1	WK2	WK3	WK4	WK5
Clean out email inbox.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Replenish doula/midwife bag.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure client/inquiry tracking is up to date.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clean up desk space.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reading that will help me grow as a professional.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check purse & email for expense receipts, file and record in accounting system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create receipts for any income received. Record income in accounting system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check business bank accounts for accuracy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send or re-send any invoices for fees due.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review week & reflect on positive accomplishments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set goals & schedule related tasks for next week.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing & Social Media					
Review pay per click ad campaigns. Adjust images, marketing messages & targeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check website analytics for any important changes or statistics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Facebook insights & adjust content plan if needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start promoting, or continue to promote, any upcoming events.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan, or continue to develop, any promotions or special features for next week/month.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan & write content for my email list.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule/queue social media updates for next week.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Think of one new way to promote my brand next week.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facebook: Like 5 new fanpages and comment on them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pinterest: Find 5 new accounts to follow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Month:

Goals for This Month

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New Projects to Consider

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Notes to Self

Recurring Monthly Tasks

Administration & Accounting

- Restock all office supplies.
- Backup your computer & website.
- Reconcile your business bank accounts.
- Finalize income & expense record keeping for the month.
- Pay all monthly expenses and set a budget for next month.
- Set aside a percent of any income for tax and savings purposes.
- Compile client statistics for professional organization (DONA, MANA).
- Work on certification or recertification paperwork.
- Plan a surprise gesture of kindness for at least one client.
- Review highest referral sources. Send thank you cards/gifts.
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Marketing & Social Media

- Review website for any pages or images I need to tweak.
- Check resource list & add a few new resources.
- Check monthly web traffic report & track changes.
- Check search engine ranking. Adjust SEO on website.
- Send testimonial request emails. Add new testimonials to website.
- Update cover board images in Pinterest.
- Reorder Pinterest boards based on season/trending topics.
- Update Facebook cover photo.
- If blogging: create an editorial calendar for next month.
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Other Tasks

- Reflect on the past month & positive accomplishments.
- Set business goals for next month.
- Read through & modify business plan as necessary.
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