

YOUR WEEKLY PLANNER

DATE: _____

EXAMPLE

Optimise your week ahead with the 'Weekly Planner'. Prioritise your tasks, map out your projects and drive your outcomes. This template will help you to stay focused and efficient in your pursuits.

WHAT PROJECTS ARE YOU WORKING ON?

PROJECT	WHAT ACTION IS NEEDED THIS WEEK?
① Launch new product for clients	Get comms out to clients with latest news and offerings
② Increase company turnover	Implement actions from last board meeting
③ Home office	Chase up builders for concrete date
④ Produce investment video	Discuss with marketing
⑤	

SHORT TERM - CLIENTS, PROSPECTS AND TEAM TO WORK ON THIS WEEK

NAME	ACTION NEEDED?	BEST RESULT?	✓
Olivia Khan	Call for catch up	Get the go ahead for new business	
William Garcia	Email to do list	Get the ball rolling to increase turnover	
Emma Smith	Confirm date for garden works	One step closer to home office build	

LONG TERM - CLIENTS, PROSPECTS AND TEAM TO WORK ON THIS WEEK

NAME	ACTION NEEDED?	BEST RESULT?	✓
Entire client list	Get comms update out to all	Positive feedback	
Noah Martin	Research to ensure advice is relevant, have there been any changes in circumstances?	Share fresh recommendations for client	
My own investments	Ensure all tax breaks are utilised	Money saved, investments upgraded	

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MAP YOUR WEEK AND NOTE THE OUTCOMES

DAY	THE AIM	THE OUTCOME
MONDAY	Email Will to do list following board meeting	Follow up to ensure it is being actioned – grow turnover
TUESDAY	Try Olivia for new product confirmation and get comms out to clients	Grow our offering and attract more clients
WEDNESDAY	AM research and relevance, PM meeting with Noah	Ensure we are doing all we can to keep him happy
THURSDAY	Get some time in with marketing to produce the new investment video	Marketing manager edit and sign off
FRIDAY	Investment upgrades	Funds utilised for the best
SATURDAY	Go for a run	Marathon training, 16 weeks to go!
SUNDAY	Call Emma to plan date for building works to commence	Ensure timing lines up with delivery and builders