



Mom Business Academy - Organization

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?

Area & Why?

Area & Why?

BRAIN DUMP - COMMON TASKS

What are common tasks in each area that could be better organized?

Finances

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Marketing

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Sales

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Human Resources

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Customer Relationships

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Products & Services

- 1.
- 2.

- 3.
- 4.
- 5.

Responsibilities:

Finances

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Project Management

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Social Media

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

Content Creation

- 1.
- 2.
- 3.
- 4.
- 5.

Responsibilities:

The Daily Checklist

- ☐ Big Goal Reviewed
- ☐ 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 Hour (schedule in time for growth & learning)
- ☐ Set Office Hours
- ☐ Home Plan

- ☐ Content Creation (blog, social, newsletter)
- ☐ Office/Desktop - clean up and archive
- ☐ Check in with your team

The Monthly Checklist

- ☐ Review Finances (input or review costs, pay bills, run reports, check P&L)
- ☐ Review your LR Assessment Plan
- ☐ Plan/Review Next Month's Goals
- ☐ Record Metrics (size of newsletter list, social media accounts, pinterests, website views, podcast, etc.)
- ☐ Review Marketing Initiatives
- ☐ Reach out to last month's clients/customers for testimonials (even better if this is automated)
- ☐ Check in with yourself!

Quarterly Map

Quarter 1 (Jan-March)

Quarter 2 (Apr-June)

Quarter 3 (July-Sept)

Quarter 7 (Oct-Dec)

Hiring BOB

Bob stands for Best Operation Breakdown. It's a checklist that you (or a team member) create to document all steps and processes for the very best way to complete a task.

These BOBs are invaluable. They allow you to make sure you're not missing a step at any given time, and when you hire someone to help, they now have their own training database to get them going immediately.

Where are areas you believe having a BOB could help?