

Welcome to the world of entrepreneurship! I'm thrilled that you've chosen to embark on this journey, and I'm honored that you've decided to download my digital planner, "From Hustle to Enterprise."

Let me start by sharing a bit about my own journey. Entrepreneurship, as you'll soon discover, is a rollercoaster ride filled with exhilarating highs and challenging lows. Along the way, I've learned invaluable lessons. I realized that my hustle not only brought me immense joy but also became a means to provide for my family. However, it came with sacrifices—instances where I had to trade precious family time for the pursuit of business success.

With this planner, my aim is to empower you. It's designed to help you reflect on where you currently stand in your business and, more importantly, guide you on how to continue growing it. Starting from scratch can be daunting, which is why I've included fundamental business information that I wish I had when I began my own entrepreneurial journey.

As your business flourishes and gains momentum, it's essential to consider the shift from solely creating a job for yourself (hustling) to establishing processes that allow your business to thrive independently. Think about your end goal. What do you envision for your business in the long run? This planner is a tool to assist you in implementing steps that align with your vision.

Remember, it's never too late to start this process. Whether you're just starting or looking to scale further, this planner serves as a guide. However, if you find yourself needing more personalized guidance, I encourage you to reach out. Feel free to book a free consultation through my website, www.cmosesconsult.com. I'm here to offer tailored assistance to support your entrepreneurial journey.

I'm excited for what lies ahead for you and your business. Embrace the challenges, celebrate the victories, and remember, every step you take contributes to your growth.

Wishing you success and fulfillment on your entrepreneurial path.

Warm regards,

Crystal Moses
CEO/Owner
crystalmoses@cmosesconsult.com
Website: www.cmosesconsult.com






MEET
Crystal

Crystal Moses is a Georgia native born and raised. She attended Albany State University (Go Rams!). In college she always envisioned she would one day start her own business. In 2021 she took a leap of faith and started her own HR Consulting company. As she does so often, she gets a bright idea. She shared with her friends and family that she wanted to create a planner that would help guide other entrepreneurs in their first year of business. Crystal knew first hand that just having the guts to start a business was hard enough. Let alone understand what is needed and she was clueless in her journey.

This is how the Business Planner was birthed!

The Business Planner is a thought provoking guide to help you through your journey of Entrepreneurship!

"Your business needs may vary from what is printed here. This is just my perspective and experience as an entrepreneur!"

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 [@cmosesconsult](https://www.instagram.com/cmosesconsult)

 [@cmosesconsult](https://www.facebook.com/cmosesconsult)

THIS
Business Planner

BELONGS TO :

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Business Basics

COMPANY NAME: _____

TYPE: E-COMMERCE SERVICE-BASED BRICK & MORTAR INFLUENCER

TAGLINE: _____

PURPOSE

Although you may have started your business for personal reasons, every small business out there also serves the world somehow. When you uncover that purpose, you start to build the foundations of a brand that truly connects.

Think back to the start of your journey. What made you want to start your business? What problems did you want to solve. Why do you continue to do what you do?

STRENGTHS

Your strengths include everything that you do well and the things you can contribute. In analyzing your strengths, also determine how you can better implement these attributes into your business for even better results.

Consider these questions:

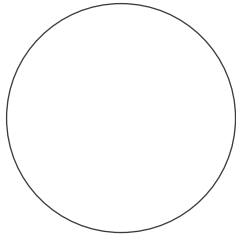
- What makes customer/clients want to work with me?
- What skills do I have and what am I especially good at?
- What can I do that no one else can?

CORE VALUES

- 1.
- 2.
- 3.
- 4.
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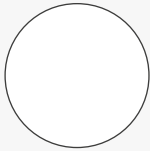
Visual Brand.

PRIMARY LOGO

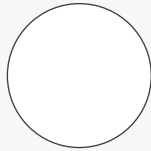


UNIVERSAL BIO

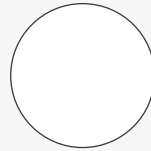
COLOR PALETTE



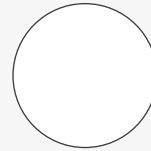
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FONTS

HEADER FONT

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SUB-HEAD FONT

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Size: _____

BODY FONT

Name: _____

Size: _____

BRAND-SPECIFIC HASHTAGS

Annual Goals

BRAINSTORM IDEAS

Think and write down as many ideas that you have that you would like to see your business accomplish (to sell 1 million products, to make a profit, to give back to the community). Anything that you can think of, both big and small. Remember, these are LONG-TERM goals that you want to complete in a year.

Then, circle 5 of your favorite ideas as possible goals. You'll want to circle the first five that grab your attention.

Annual Goals

TURNING IDEAS INTO GOALS

	Write the top 5 things you would like to work towards	What would achieving this goal do for you?	How exciting is this goal? Score it out of 10
01			
02			
03			
04			
05			

Annual Goals

GOAL	TACTICAL STEPS (HOW)	DUE DATE	STATUS

Annual Goals

YEARLY OVERVIEW

Split all of the tactical steps that you listed previously (See Annual Goals Overview) that are needed in order to achieve your goals into months according to the deadline you set.

JAN	FEB	MAR	APR	MAY	JUN
JUL	AUG	SEP	OCT	NOV	DEC

Goal Setting

Let's Talk About Smart Goals. Smart Is An Acronym That Stands For Specific, Measurable, Achievable, Relevant, And Time-bound. When Setting Goals For Your

Business, Make Sure They Are Clear And Well-defined (specific), Quantifiable Measurable), Realistic And Feasible (achievable),

Aligned With Your Business Objectives (relevant), And Have A Defined Timeframe For Completion (time-bound). This Framework Helps In Creating Focused And Actionable Goals That Contribute To Your Overall Business Success.

OUTLINE YOUR SMART GOALS BELOW

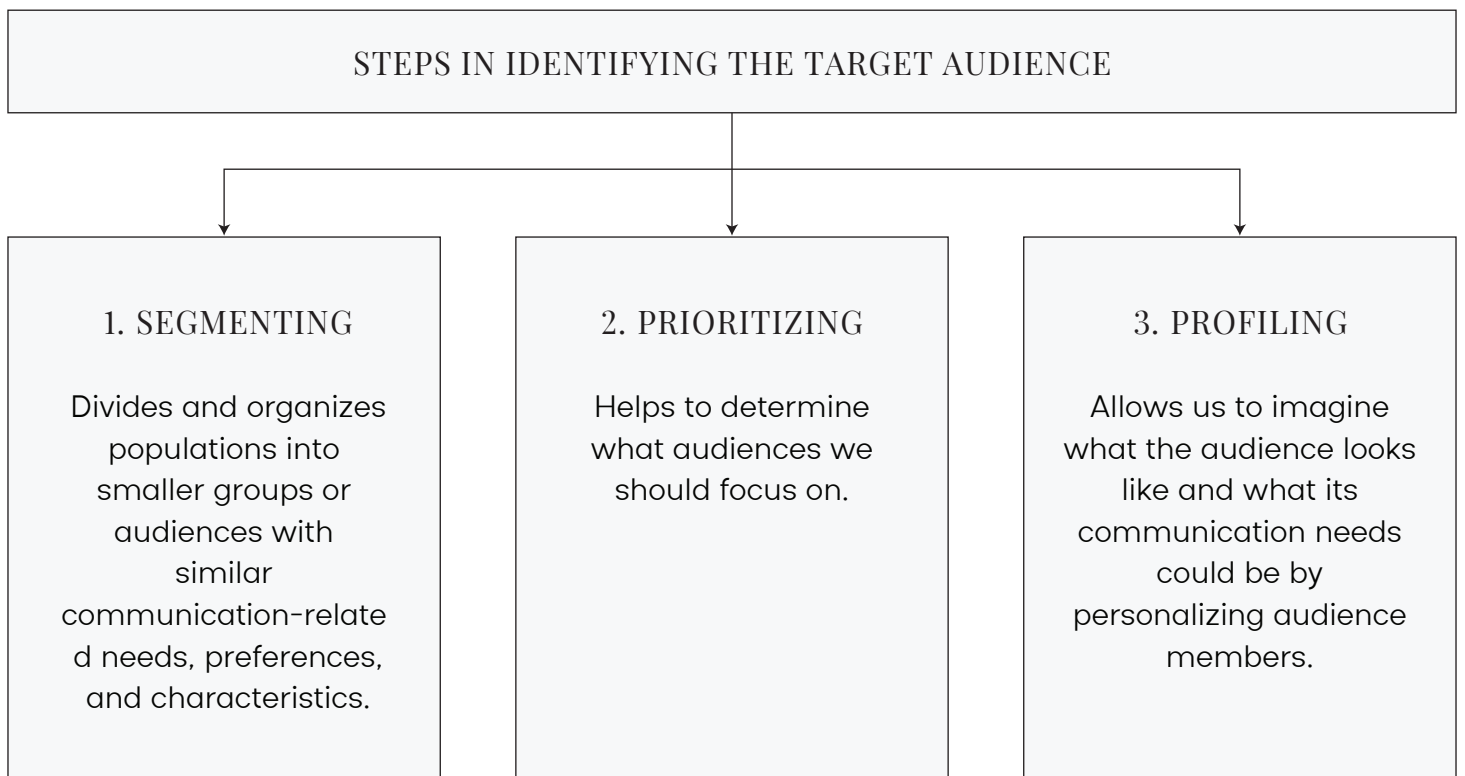
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M	
A	
R	
T	

Target Audience

Identifying and understanding your target audience is crucial for effective business strategies. Start by creating detailed Buyer Personas—fictional representations of your ideal customers. Consider Demographics, Psychographics, And Behaviors. Ask Yourself Questions Like:

Who are they? What are their needs and pain points? Where do they spend their time on-line and offline?

By knowing your target audience, you can tailor your products or services to meet their specific needs and create targeted marketing campaigns that resonate with them. It's like aiming an arrow directly at the bullseye instead of shooting in the ark.



Target Audience

When Determining Your Target Audience, Consider The Following Questions

DEMOGRAPHIC INFORMATION:

- What Is The Age Range Of Your Target Audience?
- What Is Their Gender?
- Where Do They Live? (urban, Suburban, Rural)
- What Is Their Income Level?
- What Is Their Education Level?

PSYCHOGRAPHIC INFORMATION:

- What Are Their Interests And Hobbies?
- What Values And Beliefs Do They Hold?
- What Lifestyle Choices Do They Make?

BEHAVIORAL INFORMATION:

- What Are Their Buying Habits?
- How Do They Use Your Product Or Service?
- What Channels Do They Use To Research And Make Purchasing Decisions?

CHALLENGES AND PAIN POINTS:

- What Problems Or Challenges Do They Face That Your Product Or Service Can Solve?
- What Are Their Pain Points And Frustrations?

MEDIA CONSUMPTION:

- Where Do They Get Their Information? (social Media, Blogs, Traditional Media)
- Which Social Media Platforms Do They Use?
- Do They Prefer Online Or Offline Shopping?

Accountability Partners

As a business owner you may wear several different hats. As your business grows you can outsource to fill other roles to ensure a smooth and successful operation of your business and accountability partners are crucial for ensuring you accomplish the right tasks.

REFLECT ON THIS

Who will keep you motivated when you're tempted to quit?

Who will offer fresh ideas and diverse perspectives to aid in your brainstorming session?

Who will be honest and give you constructive feedback?

Do they have industry experience?

Are they reliable?

Are they good communicators?

A large, empty rectangular box with a thin black border, intended for the user to write their reflections on the questions listed above.

Resources Needed

BUSINESS TOOLS

- Website
- Social Media Account
- Business Bank Account
- Planner
- Invoicing System
- Contracts
- Payment Processor
- CRM industry specific or organizational
- Location to house personnel files

PEOPLE NEEDED ON YOUR TEAM

- Accountant
- Graphic Designer
- Virtual Assistant
- Mentor
- Accountability Partners
- Business Coach
- Legal Counsel
- Hr *compliance to hire employees & to potentially process payroll

ONLINE COLLABORATION TOOLS

- Microsoft Teams
- Zoom
- Slack
- Microsoft Outlook

Before choosing a tool, consider your team size, communication needs, and integration requirement. Many of these tools offer free trials so you are able to test them and see which one suites your business needs

BUSINESS TRAINING

- Problem solving training
- Networking & Relationship Building
- Ethics & Sustainability
- Management Development
- Industry Specific Training
- Problem Solving

JAN

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29	30	31				

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OCT

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24	25	26	27	28	29	30
31						

Key Dates.

JANUARY

MARCH

MAY

FEBRUARY

APRIL

JUNE

Key Dates.

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

My Client

NAME _____ COMPANY _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____ WORK PHONE _____

NATURE OF BUSINESS _____

CALL DAYS	S	M	T	W	T	F	S	DELIVERY DAYS	S	M	T	W	T	F	S
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DELIVERY INFORMATION _____

REFERRED SOURCE _____

IMPORTANT NAMES	POSITION	CONTACT INFO
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

IMPORTANT NOTES

My Client

NAME _____ COMPANY _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____ WORK PHONE _____

NATURE OF BUSINESS _____

CALL DAYS	S	M	T	W	T	F	S	DELIVERY DAYS	S	M	T	W	T	F	S
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DELIVERY INFORMATION _____

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IMPORTANT NAMES	POSITION	CONTACT INFO
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IMPORTANT NOTES

My Client

NAME _____ COMPANY _____

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CITY _____ STATE _____ ZIP _____

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NATURE OF BUSINESS _____

CALL DAYS	S	M	T	W	T	F	S	DELIVERY DAYS	S	M	T	W	T	F	S
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DELIVERY INFORMATION _____

REFERRED SOURCE _____

IMPORTANT NAMES	POSITION	CONTACT INFO
_____	_____	_____
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_____	_____	_____

IMPORTANT NOTES

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____

Key Dates:

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Tonight:

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Tonight:

The Week Ahead

Thursday,

Friday,

Saturday,

Today's Top Three:	Today's Top Three:	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

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The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

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Notes & Ideas

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The Week Ahead

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Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
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The Week Ahead

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The Daily Plans

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Emails To Send

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Notes & Ideas

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Today's Schedule:

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Today's Top Three:

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Tonight:

Tonight:

Tonight:

The Week Ahead

Thursday,

Friday,

Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
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Today's Schedule:	Today's Schedule:	
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12	12	
1	1	Sunday,
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7	7	
Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Tonight:

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Tonight:

The Week Ahead

Thursday,

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Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
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Today's Schedule:	Today's Schedule:	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Top 3 Priorities:

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

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Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

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12

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6

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

6

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Tonight:

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Tonight:

The Week Ahead

Thursday,

Friday,

Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
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<input type="checkbox"/>	<input type="checkbox"/>	
Today's Schedule:	Today's Schedule:	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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My To-Do List

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Top 3 Priorities:

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Week Ahead

Monday

Tuesday

Wednesday

Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Today's Schedule:	Today's Schedule:	Today's Schedule:
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Tonight:	Tonight:	Tonight:

The Week Ahead

Thursday,

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Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
Today's Schedule:	Today's Schedule:	
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1	1	Sunday,
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

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Meetings & Calls

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Notes & Ideas

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My Schedule

Hours Worked:

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Notes & Ideas

The Daily Plans

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Notes & Ideas

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Hours Worked:

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Notes & Ideas

The Daily Plans

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Notes & Ideas

The Week Ahead

Monday

Tuesday

Wednesday

Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
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Today's Schedule:	Today's Schedule:	Today's Schedule:
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Tonight:	Tonight:	Tonight:

The Week Ahead

Thursday,

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Saturday,

Today's Top Three:	Today's Top Three:	
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<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
Today's Schedule:	Today's Schedule:	
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The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

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Hours Worked:

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My Schedule

Hours Worked:

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Hours Worked:

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Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Hours Worked:

Meetings & Calls

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Notes & Ideas

The Week Ahead

Monday

Tuesday

Wednesday

Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
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Today's Schedule:	Today's Schedule:	Today's Schedule:
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Tonight:	Tonight:	Tonight:

The Week Ahead

Thursday,

Friday,

Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
Today's Schedule:	Today's Schedule:	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Notes & Ideas

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Meetings & Calls

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Notes & Ideas

The Daily Plans

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Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
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Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

6

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11

12

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Tonight:

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The Week Ahead

Thursday,

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Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
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Today's Schedule:	Today's Schedule:	
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The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

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Notes & Ideas

The Daily Plans

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My To-Do List

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Top 3 Priorities:

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Notes & Ideas

The Daily Plans

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My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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The Daily Plans

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My To-Do List

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The Daily Plans

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My Schedule

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The Daily Plans

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Notes & Ideas

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Hours Worked:

Meetings & Calls

Emails To Send

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The Week Ahead

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The Week Ahead

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Today's Top Three:	Today's Top Three:	
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My To-Do List

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Meetings & Calls

Emails To Send

Notes & Ideas

The Week Ahead

Monday

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Today's Top Three:	Today's Top Three:	Today's Top Three:
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The Week Ahead

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Today's Top Three:	Today's Top Three:	
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Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Top 3 Priorities:

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Hours Worked:

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Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

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Notes & Ideas

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My Schedule

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Notes & Ideas

The Daily Plans

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)		DUE DATE	✓
INCOME				
NET INCOME	# OF ORDERS		# OF VIEWS	
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
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			_____ _____ _____

Key Dates:

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

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The Week Ahead

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Today's Top Three:	Today's Top Three:	
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The Daily Plans

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My To-Do List

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My Schedule

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Notes & Ideas

The Daily Plans

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Monday	Tuesday	Wednesday
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

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The Daily Plans

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Week Ahead

Monday

Tuesday

Wednesday

Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
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The Week Ahead

Thursday,

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Today's Top Three:	Today's Top Three:	
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The Daily Plans

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My To-Do List

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My Schedule

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Meetings & Calls

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Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
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			_____ _____ _____

Key Dates:

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Tonight:

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Tonight:

The Week Ahead

Thursday,

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Today's Top Three:	Today's Top Three:	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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The Week Ahead

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The Week Ahead

Thursday,

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Today's Schedule:	Today's Schedule:	
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The Week Ahead

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Notes & Ideas

The Week Ahead

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Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
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The Week Ahead

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Hours Worked:

Meetings & Calls

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End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Today's Schedule:	Today's Schedule:	Today's Schedule:
6	6	6
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7	7	7
Tonight:	Tonight:	Tonight:

The Week Ahead

Thursday,

Friday,

Saturday,

Today's Top Three:	Today's Top Three:	
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Today's Schedule:	Today's Schedule:	
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The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

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Notes & Ideas

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Hours Worked:

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Notes & Ideas

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)		DUE DATE	✓
INCOME				
NET INCOME	# OF ORDERS		# OF VIEWS	
WEBSITE				
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Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
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Monthly Tracker

MONTH OF :

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1. 2. 3. 4. 5.
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The Month Ahead

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Mon	Tue	Wed	Thu

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
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			_____ _____ _____

Key Dates:

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The Week Ahead

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Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Meetings & Calls

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Notes & Ideas

The Daily Plans

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My Schedule

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Emails To Send

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Week Ahead

Monday

Tuesday

Wednesday

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Today's Top Three:	Today's Top Three:	Today's Top Three:
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The Week Ahead

Thursday,

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Today's Top Three:	Today's Top Three:	
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The Daily Plans

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My Schedule

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Emails To Send

Notes & Ideas

The Week Ahead

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Today's Top Three:	Today's Top Three:	Today's Top Three:
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The Week Ahead

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
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			_____ _____ _____
			_____ _____ _____
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			_____ _____ _____

Key Dates:

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

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Today's Top Three:

Today's Schedule:

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The Week Ahead

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Hours Worked:

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Notes & Ideas

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The Week Ahead

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The Week Ahead

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

6

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11

12

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6

7

Today's Top Three:

Today's Schedule:

6

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Today's Top Three:

Today's Schedule:

6

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Tonight:

Tonight:

Tonight:

The Week Ahead

Thursday,

Friday,

Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
Today's Schedule:	Today's Schedule:	
6	6	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

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The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

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Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

The Daily Plans

Date: _____

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Hours Worked:

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Notes & Ideas

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Hours Worked:

Meetings & Calls

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Notes & Ideas

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My Schedule

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

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The Daily Plans

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

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The Week Ahead

Monday

Tuesday

Wednesday

Monday	Tuesday	Wednesday
Today's Top Three:	Today's Top Three:	Today's Top Three:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Today's Schedule:	Today's Schedule:	Today's Schedule:
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Tonight:	Tonight:	Tonight:

The Week Ahead

Thursday,

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Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
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<input type="checkbox"/>	<input type="checkbox"/>	
Today's Schedule:	Today's Schedule:	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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My Schedule

Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

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The Daily Plans

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Hours Worked:

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Hours Worked:

Meetings & Calls

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Notes & Ideas

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Notes & Ideas

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Monday	Tuesday	Wednesday
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Tonight:	Tonight:	Tonight:

The Week Ahead

Thursday,

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Date: _____

My To-Do List

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Hours Worked:

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Meetings & Calls

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Emails To Send

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Notes & Ideas

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Today's Top Three:	Today's Top Three:	Today's Top Three:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Tonight:	Tonight:	Tonight:

The Week Ahead

Thursday,

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<input type="checkbox"/>	<input type="checkbox"/>	
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Hours Worked:

Meetings & Calls

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Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

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The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
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FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
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1. 2. 3. 4. 5.
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The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

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The Week Ahead

Thursday,

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Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
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Today's Schedule:	Today's Schedule:	
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Tonight:	Tonight:	

The Daily Plans

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My To-Do List

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Meetings & Calls

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The Week Ahead

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Today's Top Three:

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Tonight:

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The Week Ahead

Thursday,

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Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
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Tonight:	Tonight:	

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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My Schedule

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Notes & Ideas

The Week Ahead

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Today's Top Three:	Today's Top Three:	
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Hours Worked:

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Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____

Key Dates:

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

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Today's Top Three:

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Today's Top Three:

Today's Schedule:

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Today's Top Three:

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The Week Ahead

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My To-Do List

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Hours Worked:

Meetings & Calls

Emails To Send

Notes & Ideas

The Daily Plans

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Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Monthly Goals

BUSINESS GOALS

GOAL	TACTICAL STEPS (HOW)	DUE DATE	✓	
INCOME				
NET INCOME	# OF ORDERS	# OF VIEWS		
WEBSITE				
EMAIL SUBS	UNIQUE PAGE VIEWS	UNIQUE VISITORS	GOOGLE VISITORS	
SOCIAL MEDIA				
FB	X	INSTA	PIN	YT

Monthly Overview

MONTH OF: _____

NET REVENUE

INCOME	
OUTCOME	
BALANCE	

ORDER		REVENUE	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	
SUBSCRIBERS		PAGE VIEWS	
LAST MONTH		LAST MONTH	
GOAL		GOAL	
STATUS		STATUS	

Monthly Tracker

MONTH OF :

BEST SELLING ITEMS
1. 2. 3. 4. 5.
MOST VIEWED ITEMS
1. 2. 3. 4. 5.
TOP KEYWORDS
1. 2. 3. 4. 5.
TRAFFIC SOURCES
1. 2. 3. 4. 5.

The Month Ahead

MONTH: _____

Mon	Tue	Wed	Thu

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MAIN FOCUS: _____

Fri	Sat	Sun	Ideas:
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____
			_____ _____ _____

Key Dates:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Week Ahead

Monday

Tuesday

Wednesday

Today's Top Three:

Today's Schedule:

6

7

8

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11

12

1

2

3

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5

6

7

Today's Top Three:

Today's Schedule:

6

7

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Today's Top Three:

Today's Schedule:

6

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Tonight:

Tonight:

Tonight:

The Week Ahead

Thursday,

Friday,

Saturday,

Today's Top Three:	Today's Top Three:	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
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Today's Schedule:	Today's Schedule:	
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Tonight:	Tonight:	

The Daily Plans

Date: _____

My To-Do List

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Top 3 Priorities:

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My Schedule

Hours Worked:

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Notes & Ideas

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Notes & Ideas

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Monday

Tuesday

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Tonight:	Tonight:	Tonight:

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Thursday,

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Meetings & Calls

Emails To Send

Notes & Ideas

End of Month Reflection

Top 5 Accomplishments:

What Did I Do Well?

What I Need to Improve?

Biggest Lessons?

Grateful For

The Hardest Thing About This Month Was

Rate     

Business Processes

Process:

Checklist:

Process:

Checklist:

Process:

Checklist:

To-Do List.

PRIORITY	DUE DATE	WHAT	IN PROGRESS	✓

Stop List.

STOP DOING	WHY?	TIME SAVING

Hiring Employees

When you are deciding to hire an employee(s) here are a few factors to consider:

1. **Assess Business Needs:** How will this role contribute to the growth of my company? Will hiring an employee be the most effective solutions?

2. **Financial Feasibility:** Can my budget accommodate hiring a new employee without causing a financial hardship? This includes the cost to source candidates, the employee's salary, and any benefits you may offer.

3. **Workload and capacity:** Is there a real need for this position? Are there skillsets that someone else may have to complete the job you need done? Does someone on the team have the capacity to learn a new skillset?

4. **Long-Term Strategy:** If you create this position will it meet the needs of the business in the future as you continue to grow?

5. **Skills and Culture Fit:** Determine what skills this new employee will need to possess. Look at the company mission vision values and determine what type of employee persona would be a good hire.

Once you have decided to hire an employee use the below information to get started.

I. Employee Location: In-Person, Remote, or Hybrid

II. Single State VS. Multistate workforce

III. HR Documents (handbook, application, disciplinary forms, letter heads, and other templates)

IV. Contractors VS. W-2 employees

V. Payroll Bank Account (federal, state, unemployment withholdings)

Before Hiring	During Hiring	After Hiring
<ul style="list-style-type: none">• Job Description• Budget• Recruitment Plan• Interview Process	<ul style="list-style-type: none">• Conduct Interviews• Reference Check• Offer Letter• Background Check	<ul style="list-style-type: none">• Onboarding• Set Expectations• Performance Review

Application for Employment

(Fully complete both pages)



_____ Date of Application

Please Print

Social Security Number	Last Name	First Name	Middle Name
Address (street number and name)		City	County
State	Zip Code	Phone (home or where you can be reached)	E-mail Address

Position Applied For: _____

Date of Birth: / / N. C. Driver's License Number _____
(month) (day) (year)

Have you ever been convicted of breaking a law other than a minor traffic violation?

YES NO If yes, give the date and explain fully on an additional piece of paper if more space is needed

Have you ever had a Department of Social Services (DSS) substantiation?

YES NO If yes, list county/State and give the date and explain fully on an additional piece of paper if more space is needed

(The offense(s) and how recently you were convicted will be evaluated in relation to the job for which you are applying.)

Education

Circle the highest grade completed: 1 2 3 4 5 6 7 8 9 10 11 12 GED College 1 2 3 4

Schools	Name and Location	Dates Attended	Course of Study	Degree/Diploma
High School				
		to		
College or University		to		
		to		
		to		
		to		
		to		
Graduate or Professional		to		
		to		
Educational, Vocational Schools, etc.		to		
		to		
		to		
		to		

Child care training you have completed in the last three years (such as first aid, CPR, CDA, ITS-SIDS, etc.):

References

List the names, addresses and phone numbers of two people we may contact as references:

Work History

(List child care/early childhood experience first.)

Current or Last Employer			Address		
Job Title			Supervisor's Name		No. Supervised by you
Date Employed (mo/yr)	Starting Salary \$ Per	Ending Salary \$ Per	Reason for leaving		May we contact employer? yes no
Date Separated (mo/yr)			Duties:		
Full Time	Years	Months			
Part Time	Years	Months			
If part time, number of hours per week					

Current or Last Employer			Address		
Job Title			Supervisor's Name		No. Supervised by you
Date Employed (mo/yr)	Starting Salary \$ Per	Ending Salary \$ Per	Reason for leaving		May we contact employer? yes no
Date Separated (mo/yr)			Duties:		
Full Time	Years	Months			
Part Time	Years	Months			
If part time, number of hours per week					

I certify that I have given true, accurate, and complete information on this form to the best of my knowledge. In the event confirmation is needed in connection with my work, I authorize educational institutions, associations, registration, and licensing boards, and others to furnish whatever detail is available concerning my qualifications. I authorize investigations of all statements made in this application and understand that false information of documentation, or a failure to disclose relevant information may be grounds for rejection of my application, disciplinary action, or dismissal if I am employed, and (or) criminal action. I further understand that dismissal on unemployment shall be mandatory if fraudulent disclosures are given to meet position qualifications.

Signature of Applicant _____ Date _____

[Date]

[Candidate Name]

[Street Address]

[City, State Zip code]

Dear [Candidate Name],

We are pleased to offer you the position of [job title] at [Company Name] reporting to [Name, title].

This position offers an hourly rate of \$____, which is paid on a biweekly basis. This position will be considered a nonexempt position, which means that you will be eligible for overtime time pay for hours worked in excess of 40 in a given workweek.

This is a full-time position, and hours of work and days are [insert schedule]. Evening and weekend work are required as job duties demand.

Full-time employees are eligible for company benefits, including __ [days] of PTO, which is accrued at the rate of _____ hours per biweekly pay period. Further details will be provided at the new-hire orientation program, scheduled during your first week on the job.

Your employment with our company is at-will, which means that either you or the company may terminate the relationship at any time.

As previously discussed, [day, date] will be your first day of employment with us. Kindly indicate your understanding and acceptance of our offer by signing below and returning a copy in the enclosed envelope no later than [date]. This employment offer expires as of [date]. Should you have any questions, feel free to contact [name] at [number].

We look forward to seeing you on [date].

Sincerely,

[Your Name]

[Title]

I accept the offer of employment set forth above.

Signature: _____

Date: _____

UPDATED
10/30/23

Authorization for Direct Deposit

NAME: _____ LAST 4 OF SS# XXX-XX- _____
EMPLOYEE NAME (PLEASE PRINT CLEARLY)

DEPARTMENT: _____ DATE: _____

EMAIL : _____

SELECT ONE: BEGIN DIRECT DEPOSIT
 CHANGE BANK/ACCOUNT #
 ADD/DELETE SECONDARY ACCOUNT

ALL INFORMATION MUST BE
CORRECT & COMPLETE:
Please Contact Your Financial
Institution to verify all information,
Particularly the ACH Transit Routing
Number which is not always the
transit number on your check.

PRIMARY ACCOUNT INFORMATION:

_____	_____
Name of Financial Institution	Account Number
_____	_____ or _____
ACH Transit Routing Number (9 DIGIT)	Checking Savings

Please Complete the following box if you want pay deposited into more than one account:

OPTIONAL Secondary Account Information	Designate amount of pay to be deposited Into this second bank account each pay period \$ _____

Name of Financial Institution	
_____	Note: The balance of Net Pay will be deposited into your Primary Account
ACH Transit Routing Number	_____ or _____
_____	Checking Savings
Account Number	

[Your company name] WILL NOT issue any paychecks; once direct deposit has been transmitted, your bank is responsible for the availability of your funds. If you have closed your account, the bank will refund the money to the district; however, [Your company name] must wait for the receipt of these funds before they can be reissued to you or redeposited to your new account.

<p>***for CHECKING ACCOUNT, ATTACH VOIDED CHECK***</p> <p>****for SAVINGS ACCOUNT, ATTACH COPY BANK STATEMENT, OR DOCUMENT FROM BANK SHOWING ACH # & ACCOUNT # ****</p> <p>OR</p> <p>ATTACH YOUR BANK'S COMPLETED DIRECT DEPOSIT FORM MUST ACCOMPANY THIS FORM</p>
--

I AUTHORIZE [Your company name] to initiate credit entries, or debit corrections, to my account(s) as listed above. I understand it is MY RESPONSIBILITY for obtaining funds from the bank(s) once they have been transmitted.

This authorization will remain in effect until Administration has received written notice of termination from me.

SIGNATURE

DATE

Disciplinary Action Form

Employee Information:

Employee Name: _____

Employee ID: _____

Department: _____

Position: _____

Date of Incident: _____

Description of the Incident:

Please provide a detailed description of the employee's actions or behavior that led to the disciplinary action. Include the date, time, location, and any witnesses.

[Text area for the description]

Company Policy Violation:

Check the box that best describes the policy violation(s):

- Attendance/Timekeeping Violation
- Insubordination
- Misconduct
- Poor Performance
- Violation of Safety Rules
- Other (Specify): _____

Investigation Details:

Date Investigation Initiated: _____

Investigating Supervisor: _____

Witnesses (if any): _____

Outcome of Investigation: _____

Previous Incidents:

Check if the employee has had any previous disciplinary actions within the past [insert time frame]:

Yes

No

If "Yes," please provide details of previous incidents and actions taken.

[Text area for the details]

Action Taken:

Check the appropriate disciplinary action taken:

- Verbal Warning
- Written Warning
- Suspension
- Termination
- Other (Specify): _____

Disciplinary Action Details:

Date of Disciplinary Action: _____
Supervisor/Manager: _____
HR Representative: _____

Attachments:

- Witness Statements
- Incident Reports
- Other (Specify): _____