

# Planning Habits

*Your planning strategy to stay in proactive mode in 3 easy steps*

**NOTE: Book these in your appointment book now!**

## Quarterly Planning (30 Days)

Plan for the upcoming quarter before it starts – ideally at least 30 days ahead of time.

- What 1-3 launches or bigger projects are coming up in the next 30 days??
- What programs need to be delivered in this timeframe? What products need to be created?
- What are my top 3 priorities for the quarter? What is closest to the money? To my purpose?

## Monthly Planning

Review your quarterly plan and adjust/tweak as necessary.

## Weekly Planning

Recommend doing this end of the week (Friday) or Sunday afternoon (if you work weekends) – don't leave this until Monday morning as you risk getting caught up in everything going on and not planning at all.

- What is on the **promotional calendar** this coming week? (all marketing activities)
- What is on the **delivery calendar** for this coming week? (classes, membership activities, etc.)
- What is on my **calendar** for this coming week? (appointments, teaching etc.)
- What are the top **3 projects** that I want to ensure are completed this week?

## Daily Planning

Best to do at the end of each day – last thing on your list before you sign off.

- What are the top 3 tasks I need to complete tomorrow?
- What are the top 3 tasks or deadlines that are due tomorrow?
- Where do I need to potentially shift priorities or tasks? (keeping an eye on potential issues)

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