Daily Planning for Entrepreneurs

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We exist to train, educate, and support entrepreneurs of both new (pre-venture) and established small businesses. Positioned within the nationwide network of SBDCs, we offer resources, key connections at the state and national level, workshops, and online and in-person support that equips us to help Ocean State entrepreneurs reach the next level of growth.
Review Session 1:
5 Core Marketing Functions
1. **Creating Your Avatar**: Clearing defining you is your IDEAL target for you product or service.

2. **Lead Generation**: The act of generating a lead that has given you PERMISSION to communicate with you. This is an exchange of contact information.

3. **Lead Nurture**: This is the entire process and every touch point you make to get them to make a purchase from you.

4. **Conversion & Delivery**: The exchange of money for your products or services. This can happen on a website (eCommerce), in-person (store fronts and restaurants) or over the phone. How to you delivery your products or service to be sure the customer is happy and gets what they expected to receive. What does your packaging and delivery look like? Did you keep your promises?

5. **Retention and Upsell**: How you get your client to be excited about their product and service and tell everyone about their experience. How do you get them to purchase again? Are they satisfied? Do you get lots of returns?
5 Core Marketing Functions to Grow Your Business

Webinar: https://rhody.webex.com/webappng/sites/rhody/recording/998605fc14264b32b5ea6ba09c99bf76/playback

The CEO Schedule
What is the CEO Schedule?

Do I have to wake up at 4am?

Can you be successful if you don’t work sixteen hours per day?

You begin to wonder if you’re doing it all wrong. We compare our work lives and productivity against the success of our peers.

Instead of wondering WHEN you will have time to be your Marketing Director, I want to invite you to be MINDFUL about where you invest your time and to PLAN your marketing activities.
As entrepreneurs, we are always deciding the best places to invest our time.

This presentation is for you if:

- Do you constantly feel you do not have enough time in a day to get it all done?
- Do you wake up in the morning unsure what revenue generating activities you will perform that day?
- You aren't clear on how much time each activity requires and no clue where to start.
All 24 Hours Are Not Equal

With our given 24 hours in a day, we have to find the best and highest use of our time.

Productivity is being able to make the most of our time and create lasting habits of achievement and fulfillment instead of chasing endless lists of tasks. In other words, work smarter, not harder.

Each of our 24 hours looks different. Some of us are caring for parents, children, working a side job to support our business. Give yourself some grace and find areas of opportunity in your schedule that can be used more efficiently.
# Time Blocking

## Model Work Week

<table>
<thead>
<tr>
<th></th>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
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<td>REFERRAL LUNCH</td>
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<td>1:00 PM</td>
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<td>Appointment</td>
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<td>REFERRAL LUNCH</td>
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<tr>
<td>2:00 PM</td>
<td></td>
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<td>Appointment</td>
<td>Appointment</td>
<td>Appointment</td>
<td>BREAK OUT BLOCK</td>
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<td>3:00 PM</td>
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<td>Appointment</td>
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<td>2nd &amp; 4th WKS</td>
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Foundation
A Note on Productivity

For entrepreneurs, productivity is directly correlated to the success of our businesses. How much we get done determines the outcome and growth of our income, business and even our personal lives.

It's difficult to argue to the contrary. Our long term outcomes are determined by how much we can DO.

But how do we do it all?

There are three habits that are critical to the foundation of your success.

The following 3 things are what people call ‘The Secret Weapons of Success’. 
Sleep

Sleep is crucially important for entrepreneurs but so many avoid is getting restful, productive sleep. The more efficient your sleep is, the more effective and efficient you will be during the day. This may be one of the hardest habits for entrepreneurs to accept, but it is also one of the most important. You can accomplish infinitely more with a well rested mind and body.

Sleep is needed for a number of reasons:

- Energy conservation
- Restoration of our tissues
- Cognitive function
- Emotion regulation
- Immune health.
Hydration is as important if you sit at a desk all day or if you have an active life. Your cells need adequate hydration to optimize the production of energy. Mild dehydration has been found to affect short-term memory, alertness and concentration, and subsequently impair performance on tasks.

**Increased Energy**
Staying properly hydrated can give you high energy levels that you can sustain all day long.

**Increased Awareness**
Staying properly hydrated allows you to think more clearly.

**Increased Performance**
You can avoid the afternoon slump and be more productive.
The morning routine sets the tone of your day.

If you study successful people, one thing that you’ll notice really quickly is that they share a bunch of similar habits—and the daily ritual is one of them. This is why. And being busy isn’t an excuse. In fact, the busier that you get, the MORE you need it.

For most of the people mornings are insane – there’s so much to be done with so little time. Get up, decide what to eat for breakfast, what to wear, pack, etc. No wonder so many people dread those. All of these decisions and activities build up a lot of stress that ultimately drains the willpower and sets a rushed mood for the day.

However, it’s best to save that energy for more important decisions throughout the day, like eating healthy or exercising.
Morning Routine [ How to Win the Day ]

Silence
- Meditation.
- Prayer.
- Breathing.
Whatever it is for you, the idea is to quiet your mind, block out the chatter, and start the day with calm thoughts.

Affirmations
- Encouraging words you tell yourself to achieve your goals, overcome fears, be healthy and happy, and live out your purpose.

Visualization
- Imagine yourself doing each thing, step by step, that you need to do to accomplish your goals. Then imagine what it will feel like when you succeed.

Exercise
- It doesn’t have to be powerlifting or long distance running. Just do some bodyweight exercises for 5 minutes to get the blood and oxygen flowing to the brain.

Reading
- Fill your brain with positive thoughts and ideas to improve yourself. Learn the knowledge of people who have accomplished the things you want to do.

Scribing
- Writing or journaling is a great way to process your thoughts and reflect on your life. It will help you be more self-aware and more articulate.
Daily Planning
What Are Your ‘Big Rocks’?

Sales Calls, Drop Bys, Visits

Team Training, Coaching, Accountability

Marketing Action Steps to Compliment Sales

Client Servicing, Follow Up, Retention

Tactical To-Do’s

Action Plan to Build my Power Network
Overwhelm is due to lack of clarity.

Shut out what the outside world and do an audit on your business. Identify the **THREE THINGS** you need to accomplish in your business to see growth.

Most businesses need:
- Lead Generation
- Lead Nurturing
- Conversions (SALES!)
Where Are You In Your Business

An early-business owner’s calendar should primarily focus on **LEAD GENERATION & CONVERSION**.

Elements like messaging, content creation, PR and publicity, lead nurturing, cross-promotion, should all be included in your calendar on an ongoing basis.

A mid-stage business owner’s calendar should primarily focus on **DUPICATION** and **MULTIPLICATION**. Elements like a morning team meeting (for the delivery of instruction, rolling out the day’s focus, and delegating tactical assignments), cross-promotion, and lead cultivation should all be included in your calendar on an ongoing basis.
Leveraging Your Time
A.D.O.D.

AUTOMATE
Set up systems, processes and internal trainings to take the day to day out of as many tasks as possible.

DELEGATE
Work on learning to let go of control and allow others on your team to grow. It’s empowering and keeps employee morale up.

OUTSOURCE
Know when to hand over a task: email templates, social media templates, prospecting tools.

DELETE
If there are tasks that are not bringing in profits, helping you grow, or serving you
- stop wasting your time and get rid of them!
Set up systems, processes, structure and internal training so you can do something once, document it and automate it to make the task replicable.

Marketing automation is a way to automate your digital marketing tasks so you can focus on the bigger picture. Connect with your users in a more personalized way, so it still looks completely individual and natural. You can send emails, messages, and run smooth online marketing campaigns without spending hours every day.

Using the right tools and software to automate your marketing strategy can save you hours every day. Since all your marketing tasks are well-managed with tools, there’s less chance of human error and you can work on other priority tasks.

Automation can help in generating new leads, building trust with your customers, and taking your business to the next level. It also helps with creating reports so you can identify patterns over time and improve your processes even more.
Delegation

There is only so much you can do. No small business owner runs their business without appointing someone to help them out on occasion. There is too much for a business owner to do in a growing enterprise. Gallup notes that small business owners who know how to delegate generate better growth for their business. The art of delegation isn’t an innate trait of entrepreneurs, and for a small business owner, a lot of behavioral traits need to be adjusted before commission becomes second nature.

Delegation includes the usage of tools. Know when to get a tool to streamline your business.

Interns and virtual assistants are also an option.
Outsource

When can someone do a task better, faster and cheaper?

Creative Market

15,409 Results for "social media pack"

Here are some popular searches:

- social media bundle
- social media
- social media template
- media kit

Social Media Bundle
by Alise Stern in Templates

Social Media Pack - Kelsey
by Lemon Creative in Templates

CANVA Bundle Social Media Pack
by Ebony in Templates

Writers Social Media Pack + Stories
by September 5th in Templates

BUNDLE ANIMATED Social Media
by Ebony in Templates

Romance Social Media Pack CAN
by Peel This in Templates
Email Marketing

Avoid the junk folder with freelance email marketing services ⚪ How Fiverr Works

- Audience Development
- Campaign Management
- Email Automations
- Email Platform Support
- Cold Emails

Service Options ▼ Seller Details ▼ Budget ▼ Delivery Time ▼

620 services available

Sort by Best Selling ▼

- shawon1007
  - Level 2 Seller
  - I will build a niche targeted email list in 24 hours
  - ★ 4.9 (125)
  - STARTING AT $5

- dividevs
  - Level 2 Seller
  - I will create email template and html email template newsletter
  - ★ 4.9 (51)
  - STARTING AT $35

- laurenabird
  - Level 2 Seller
  - I will create powerful emails for your marketing ideas
  - ★ 5.0 (36)
  - STARTING AT $75

- jobbynobin
  - I will scrape 50k emails for your target email marketing
  - ★ 4.9 (15)
  - STARTING AT $5
What tasks have zero return, but keep you busy?

What is no longer serving your business?

What could you be doing instead?

TASK: Identify 3-5 tasks in your business you could go stop doing and it would have no effect on your business.
Time Audit
Do you go into work each day playing defense: fielding requests as they come in, reacting to events as they unfold, and putting out fires that probably could have been prevented?

Do you often get to the end of their day and realize you didn’t have time to eat lunch and yet never got anything accomplished?

Does that resonate with you? If so, perhaps it’s time to dive deep into your schedule and find out why you’re feeling so unproductive and depleted at the same time.

Being busy and being productive are not the same. We can be busy all day and get nothing accomplished. We can be productive for several hours and get closer to our goals.
PRODUCTIVE

Completing important tasks that are not always fun to do.

Listening to audio books while travelling to school or work.

Prioritizing tasks and scheduling them in their calendar.

Ability to make time for new tasks and give time to those who need it.

BUSY

Completing as many tasks as possible just to use up time.

Watching movies on Netflix while travelling to school or work.

Doing whatever comes at them with no sense of priority.

Always under the illusion that they are too busy to help anyone or take on new tasks.
Start your tracking period, and write down everything you do in a grid according to day and time—everything from checking email and client meetings to scrolling through Facebook, deep business brainstorming, and everything in between.

Audit your time for one week and identify areas of your day that could be more productive.

Identify how many hours of your day are used for INCOME GENERATING ACTIVITIES.
### Time Tracker

**What are you working on?**

<table>
<thead>
<tr>
<th>Task</th>
<th>Project</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emails</td>
<td>Office</td>
<td>3:00 PM - 3:30 PM</td>
</tr>
<tr>
<td>Creating illustrations</td>
<td>ACME</td>
<td>1:00 PM - 3:00 PM</td>
</tr>
<tr>
<td>Fixing bug #100</td>
<td>Project X</td>
<td>9:30 AM - 1:30 PM</td>
</tr>
</tbody>
</table>

**Total:** 6:00

**Week total:** 36:00
Tools
# Everyday workflows in Asana

Transition your everyday workflows into Asana.

<table>
<thead>
<tr>
<th>To-do list</th>
<th>In Asana: My Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keeping track of your to-dos</td>
<td>Add a task, assign it to yourself. All tasks assigned to you will appear in your My Tasks list.</td>
</tr>
<tr>
<td>Prioritizing your tasks</td>
<td>Add due dates to all of your tasks, and prioritize your work by marking tasks for Today, Upcoming, or Later.</td>
</tr>
<tr>
<td>Collaborating on tasks</td>
<td>Add your tasks to relevant projects, include followers and have conversations directly in a task.</td>
</tr>
<tr>
<td>Writing yourself a personal reminder</td>
<td>For a quick reminder to yourself, create a task that is not in a project. Tasks created without a project are private by default.</td>
</tr>
<tr>
<td>Using a board and sticky notes</td>
<td>Use a boards project. You can drag and drop tasks between columns the same way you can move sticky notes around.</td>
</tr>
</tbody>
</table>
12 Week Year

This methodology breaks down goals into 12 week planning segments. This approach creates more productivity and helps you keep control of your time. Because if you don’t have control of your time, you don’t have control of your outcomes.

They talk about three types of time blocking;

**The strategic block** — three hours of uninterrupted for pre-planned, strategic and money making activities.

**The buffer block** — emails, finances, making calls and the ‘stuff’ required in running a business.

**Breakout block** — time doing anything other than work. This is your thinking, reflection and play time. And it’s not the same as your weekend — this happens during your working week.
This process pushes you to create goals and the action steps you need to take each day to reach them. This allows you to identify the goals and the tactics needed to achieve each goal.

Susan Preston's Goals and Plan

**12 Week Goals**

For the Period ending 3/30/13 I will:
- Achieve 62,000 production credits
- Acquire $1M under mgt
- Weigh 130 lbs

**Goal: Achieve $62,000 production credits**

<table>
<thead>
<tr>
<th>Tactics</th>
<th>Due</th>
<th>Begin in</th>
<th>End in</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule and conduct 2 three-hour prospecting blocks each week</td>
<td>each wk</td>
<td>week 1</td>
<td>week 12</td>
<td></td>
</tr>
<tr>
<td>Schedule 10 appointments/wk</td>
<td>each wk</td>
<td>week 1</td>
<td>week 12</td>
<td></td>
</tr>
<tr>
<td>Conduct 2 client reviews every week</td>
<td>each wk</td>
<td>week 1</td>
<td>week 12</td>
<td></td>
</tr>
<tr>
<td>Develop a prompter list</td>
<td>week 5</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Develop list of 8-10 COFs</td>
<td>week 2</td>
<td></td>
<td>week 1</td>
<td></td>
</tr>
<tr>
<td>Meet with a minimum of 1 COI/wk - get 3 referrals</td>
<td>each wk</td>
<td>week 1</td>
<td>week 12</td>
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</tr>
<tr>
<td>Ask for referrals at all opens, presents, closes</td>
<td>each wk</td>
<td>week 1</td>
<td>week 12</td>
<td></td>
</tr>
<tr>
<td>Conduct 8 appointments/wk - 5 new</td>
<td>each wk</td>
<td>week 1</td>
<td>week 13</td>
<td></td>
</tr>
<tr>
<td>Update pipeline with all opens, meetings, and closes</td>
<td>each wk</td>
<td>week 1</td>
<td>week 13</td>
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</tr>
</tbody>
</table>
Beat procrastination and improve your focus

WHAT IS THE POMODORO TECHNIQUE?

A method for staying focused and mentally fresh

**STEP 1**  
Pick a task

**STEP 2**  
Set a 25-minute timer

**STEP 3**  
Work on your task until the time is up

**STEP 4**  
Take a 5 minute break

**STEP 5**  
Every 4 pomodoros, take a longer 15-30 minute break
The 25-minute work sprints are the core of the method, but a Pomodoro practice also includes three rules for getting the most out of each interval:

1. **Break down complex projects.**
   If a task requires more than four pomodoros, it needs to be divided into smaller, actionable steps. Sticking to this rule will help ensure you make clear progress on your projects.

2. **Small tasks go together.**
   Any tasks that will take less than one Pomodoro should be combined with other simple tasks. For example, "write rent check," and "set vet appointment," could go together in one session.

3. **Once a pomodoro is set, stick to it.**
   The pomodoro is an indivisible unit of time and can not be broken, especially not to check incoming emails, team chats, or text messages. Any ideas, tasks, or requests that come up should be taken note of to come back to later.
Conclusion
1. Figure out the Top 3 things to grow your business
2. Get real about where you are wasting time.
3. Create a solid morning routine
4. Adopt the A.D.O.D. Methodology
5. Recreate your CEO timeblocks
6. Use free tools to keep you on track
Resources:

Protect Your Productivity
10 Day Hydration Challenge
Effects of Dehydration
Sleep and Energy Levels
SAVERS Routine
CEO Schedule
Asana
The 12 Week Year
Pomodoro Technique
Creative Market
Fiverr
Questions?

Type your question to the chat box

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