Project Planner Name		
This:		
	To Contact:	

				Notes	
	Refu	ınds			
Item	Reasor	1	F	Refunded Y/N	Where?

Item Purchased Where Purchased Price

Supply List

Item	Type	Used	Where?

## **Affiliate Sales**

Brand	Product	Amount	Promoted where?

## Resources

Name	Items / Types	Price Range	Contact

Mar Droduc	ta	

My Products

Name	Date	Type	Listed At

## Weekly Overview

	WEEK OF:		
		GOALS	
П			_

**Projects Due** 

Item	Order #	Prepped	Received

**NEXT WEEK NOTES** 

Weekly Schedule

THI	IRSD	Δ٧		JRDAY	FRID	Δ٧
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		L
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		L

**SUNDAY** 

m	t	w	t	f	s	s

Product Funnel Product Ideas

CATEGORY	PRODUCT	NOTES	STATUS

Annual finace  Starting debt balance: Ending debt balance  Starting savings balance: Ending savings balance:  Starting income goal: Ending income balance:  MONTH INCOME EXPENSES GIVING DEBT PD SAVING						
Starting debt balance:  Starting savings balance:  Ending savings balance:  Starting income goal:  Ending income balance:  Ending income balance:  MONTH INCOME EXPENSES GIVING DEBT PD SAVING						
Starting debt balance:  Starting savings balance:  Ending savings balance:  Starting income goal:  Ending income balance:  Ending income balance:  MONTH INCOME EXPENSES GIVING DEBT PD SAVING						
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MONTH INCOME EXPENSES GIVING DEBT PD SAVING	Starting savings		Ending savings balance:			
	Starting income goal:			Ending income balance:		
			Г	T	T	T
jANUARY	MONTH	INCOME	EXPENSES	G GIVING	DEBT PD	SAVINGS
	jANUARY					
FEBRUARY	FEBRUARY					
MARCH	MARCH					
APRIL	APRIL					

MAY			
JUNE			
JULY			
AUGUST			
SPETEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			

Time Log

Activity	Start	End	Total Time	Intentional / Emergency

# Discount Trackers

Coupon Code	Discount type \$ / %	Amount offered	Start Date	End Date	Where?

Recurring Bills / Subscriptions

Product	Website	Amount	ReBills When?	How Often?

Rebill = Date How often = weekly, monthly, yearly?

## Recurring Bills / Subscriptions

January April July October February May August November March June

September December

**Bundle Listings** 

				1
My Product	Retail Value	Start date End date	Claim By Date	How to claim?
	IVIY Product	My Product Retail Value	My Product Retail Value End date End date	Ny Product Retail value End date End date End date End date End date

PROJECT NAME: PARTNERS:

JV Project

LAUNCH DATE:

SALE END:

What's Included?

Item	Who's Responsible?	Due?	Done?

Steps To Success						

# Long Term Goals

Goal:			Goal:			Goal:			
Game I	Plan:	Game Plan:		Game Plan:					
Mini goal	Goal	Reward	Mini goal	Goal	Reward	Mini goal	Goal	Reward	

## Page Explanations

So, you have a new idea that you want to plan out. This is the page to do it on. List your steps, things you need to buy or people to hire, anyone you need to contact (affiliates, coaches), and how much it's costing you to create this project.

#### Refunds

Rarely do you have to worry about refunds, but it's still good to have a place to note when and why it does happen.

#### Supply List

You bought plr, but was it written, video, blog posts? Which provider did you get it from? Have you used it yet? Where did you use it?

#### Affiliate sales

You could potentially use this to track sales for products that you are an affiliate FOR, or for sales of your products FROM your own affiliates.

#### Resources

<u>Website</u>, Coaches, <u>software</u>, <u>graphics</u>, groups.... list them here so you can remember where to find them or where you found them.

#### My Products

List all your products and where you have them for sale. Your own site, etsy, amazon...

#### Weekly overview

Make your mini goals known! Which product deadlines are happening this week? What do you need to prep for next week?

#### Weekly Schedule

Some things can only get done at special times. This is where to write those down! Have something you need to do every single day? Use the tracker.

#### **Product Funnel**

List how you get them on your list, and what each offer is from there. Or, what the item for sale is, the bump offer and any up or downsells.

#### **Product Ideas**

We all have different categories right? Lined notebooks vs complex planners. So, pick a general category, product name, make notes and mark where you are at with the process (started, not started, in production, finished, for sale).

#### **Annual Finance**

Track where you started and where you ended with 5 common finance related categories.

### Page Explanations

#### Time Log

Not sure what you are spending your time on? Track it. Be intentional and jot down your task, start and end times and if you meant to do it, or it was a spur of the moment task.

#### **Discount Trackers**

Track all the different codes you offer. Note the reason, where and when.

Recurring bills or Subscriptions.

We might have yearly or quarterly subscriptions in our business. Having a quick visual helps plan ahead for expenses.

#### **Bundle Participation**

Do you have products or services included in an online bundle sale? This is the sheet to help you track what, where and when you need to fulfill the obligations.

#### JV Projects

Easy view of the tasks for you and partners in a Joint Venture project.

#### Steps to success

Use this on a project by project basis or for your yearly goals.

#### Long Term Goals

Overview of the goals for your business. Break down the overall goal into min-goals and check them off as you achieve them.

Website Visitore Secrets.com