

**Project Planner Name** \_\_\_\_\_ Do

This:


To Contact:



















# Weekly Overview

WEEK OF:

GOALS

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Projects Due

Item	Order #	Prepped	Received

NEXT WEEK NOTES

## Weekly Schedule

MONDAY WEDNESDAY TUESDAY

THURSDAY SATURDAY FRIDAY

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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	SAVINGS
JANUARY					
FEBRUARY					
MARCH					
APRIL					



















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

[Website](#), Coaches, [software](#), [graphics](#), 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.

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