

Monthly Planning

Purpose:

To ensure all important tasks are achieved this month

Guidelines:

- Capture all the really important stuff that needs to happen this month
- Spread the work throughout the month to suit your schedule
- Don't over plan every last detail
- Be realistic about what you can achieve each week
- But be sure to push yourself a little!

Template instructions:

- Write the month in the box at the bottom
- Start by writing in any scheduled time out/significant events such as holidays
- IN actions – day to day stuff
 - For example, if running a bike shop this would be selling bikes, servicing, repairing, ordering
- ON actions – strategic stuff
 - For example, in the bike shop this would be marketing, financial, supplier negotiations
- Pull this month's actions from your ASM's and add to the plan
- Check for balance throughout the month
- Use this to create your weekly/daily plans