



PRO ORGANIZER PLANNER

by proorganizermarketing.com



THIS
PLANNER
BELONGS TO:

NAME: _____

PHONE: _____

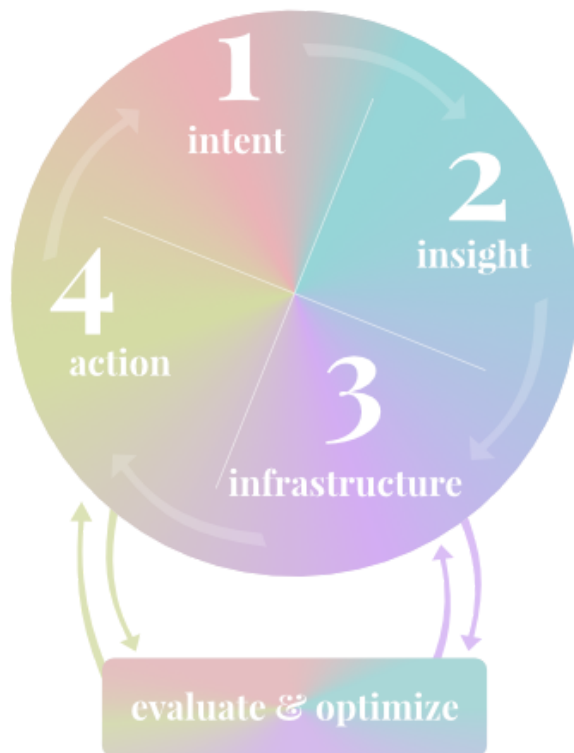
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ONTRACK WHEEL

Planning for the Long Term Success of Your Business

The OnTrack Wheel was developed as a big picture approach to continuously evaluating what's going on in your world and how you and your business should respond accordingly. While most people want to jump straight to Action in attracting ideal clients, your efforts will take you farther faster if you take a little bit of time to define Intent, Insight, and Infrastructure first. A sustainable business that continually attracts ideal clients relies on having a strategy in place to plan and respond as your business- and the world- changes. This framework starts with an intentionally set anchor followed by a thoughtful approach to review and optimize. Use this approach to help you plan goals throughout your year.



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- 1** Intent: What are you trying to achieve? What are your short term goals? What are your long term goals?
- 2** Insight: Who are you trying to reach? What do you know about them? (Age, buying habits, popular social media apps, etc.).
- 3** Infrastructure: What systems do you already have? What content is already available to use and recycle? What team members can you delegate work to?
- 4** Action: What are the specific and measurable tactics you can organize to accomplish your goals?

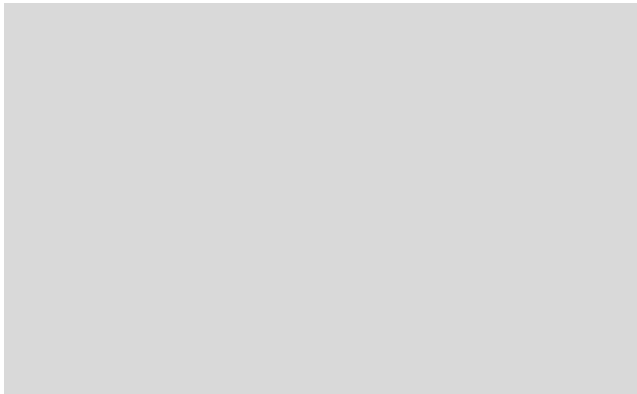
CYCLE OF SEASONS

After working through the OnTrack Wheel initially, you'll likely spend some extended time in Action, then cycle through the seasons as things change. You'll also be able to go back and revise Insight based on results of Action, and even Intent, as your goals change.

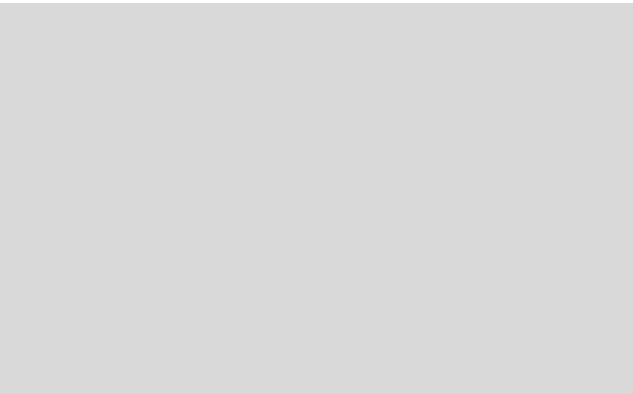
YEAR AT A GLANCE



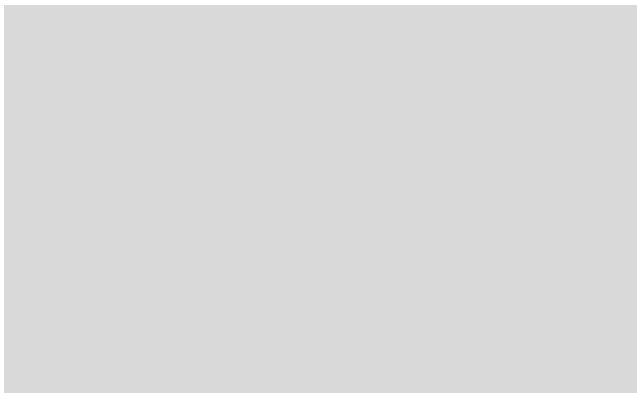
JANUARY



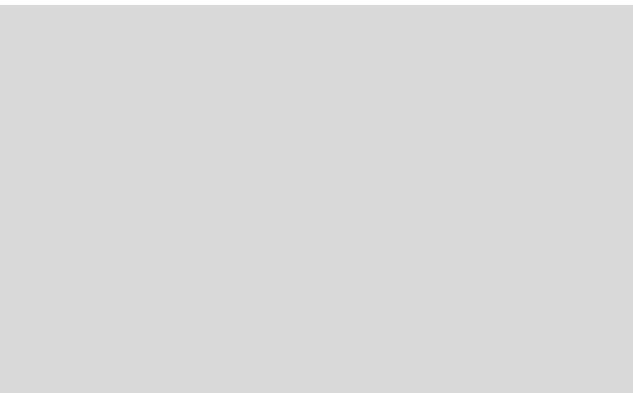
FEBRUARY



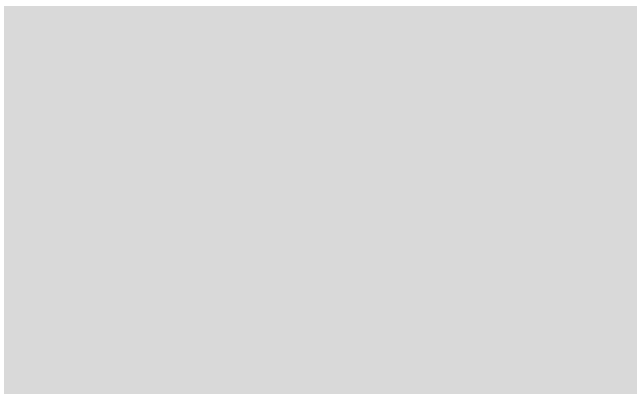
MARCH



APRIL



MAY



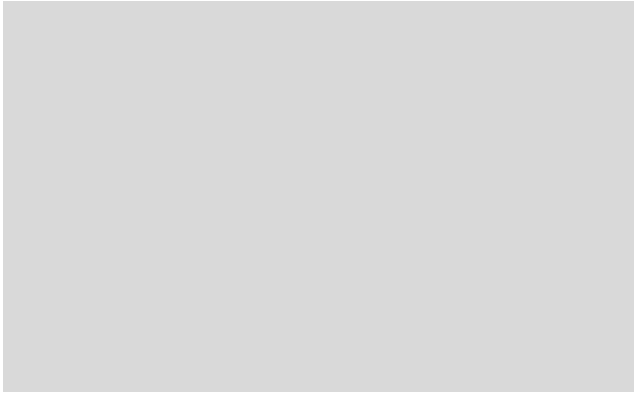
JUNE



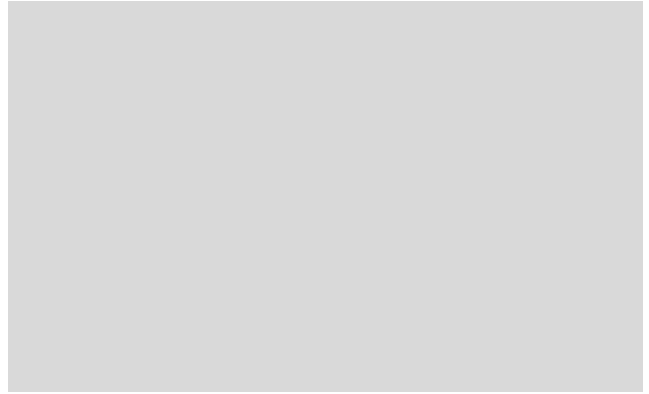


YEAR AT A GLANCE

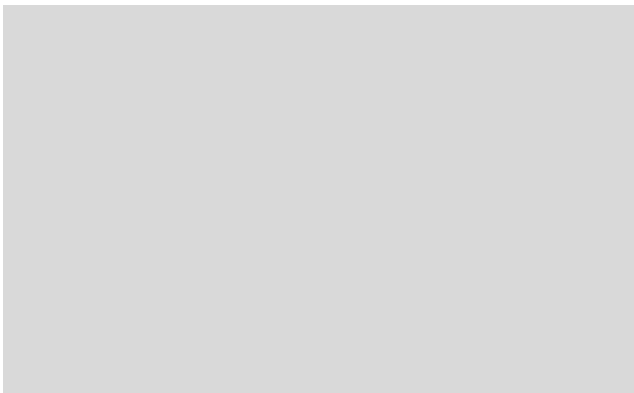
JULY



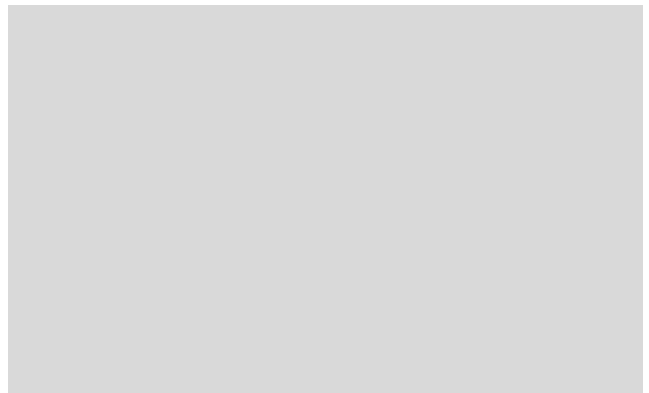
AUGUST



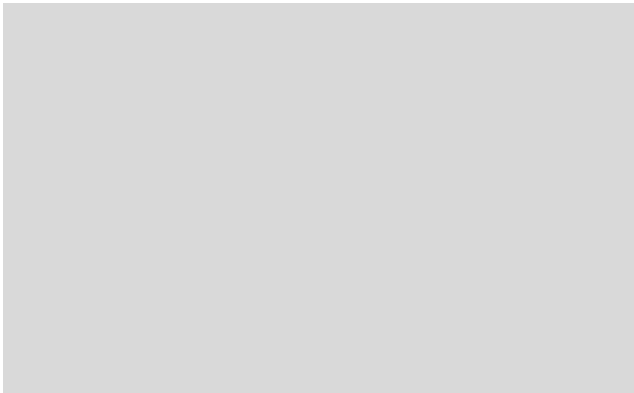
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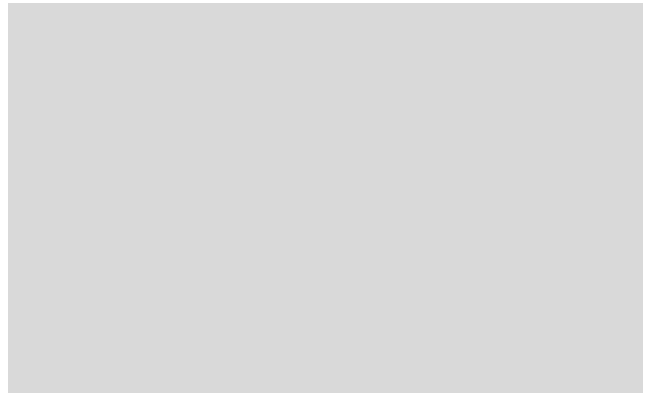
OCTOBER



NOVEMBER



DECEMBER



GOAL TRACKER

JAN

FEB

MAR

APR

JUN

JUL

AUG

SEP

OCT

NOV

DEC

GOAL

STEPS TO TAKE

- _____
- _____
- _____
- _____
- _____

DEADLINE

ACHIEVED

GOAL

STEPS TO TAKE

- _____
- _____
- _____
- _____
- _____

DEADLINE

ACHIEVED

MY GOALS

JAN FEB MAR APR JUN JUL AUG SEP OCT NOV DEC

RELATIONSHIPS	CAREER	HEALTH
SELF-CARE	STUDY	FINANCE
HOME	SPIRITUAL	ADVENTURE

MONTHLY PLANNER

JAN FEB MAR APR JUN JUL AUG SEP OCT NOV DEC

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY

PRIORITIES

NOTES

MONTH at a GLANCE

JAN FEB MAR APR JUN JUL AUG SEP OCT NOV DEC

THIS MONTH'S GOAL

BIRTHDAYS

IMPORTANT DATES

THINGS I'M EXCITED ABOUT

NOTES

MONTHLY CHECKLIST

JAN FEB MAR APR JUN JUL AUG SEP OCT NOV DEC

THIS MONTH'S GOAL

TIDY YOUR SPACE & MIND

- TIDY UP WORKSPACE
- PLAN THIS MONTH
- REFLECT ON LAST MONTH

INVENTORY & SUPPLY CHECK

NOTES

PROJECT PROMOTION

- ASK CLIENTS FOR TESTIMONIALS
- MAKE & POST TESTIMONIAL SOCIAL MEDIA GRAPHICS
- ADD TESTIMONIALS TO WEBSITE
- TAKE BEFORE/ AFTER PICS
- POST BEFORE/ AFTER PICS ON SOCIAL MEDIA
- SHARE REFERRAL INCENTIVE WITH CLIENTS ON SOCIAL OR VIA EMAIL

ERRANDS & DONATION DROP OFFS

MANAGE FINANCES ON THE 10TH & 25TH

- PAY BILLS
- SEND INVOICES
- CHECK ONLINE BANKING
- RECONCILE ACCOUNTS
- REVIEW EXPENSES

MONTH in REVIEW

JAN

FEB

MAR

APR

MAY

JUN

JUL

AUG

SEP

OCT

NOV

DEC

WHAT WORKED THIS MONTH?

ACHIEVEMENTS:

WHERE AM I ON THE ONTRACK WHEEL?

WHAT DID NOT WORK?

HOW CAN NEXT MONTH BE BETTER?

NOTES:

30-DAY HABIT TRACKER

JAN FEB MAR APR JUN JUL AUG SEP OCT NOV DEC

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WEEKLY PLANNER

MONTH:

WEEK OF:

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

SUNDAY

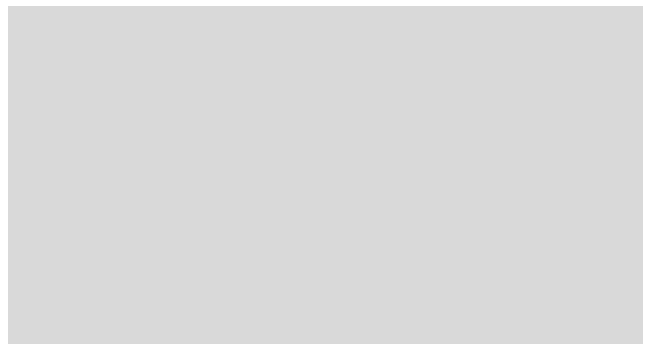
THIS WEEK'S GOAL



TO DO'S



NOTES



DAILY SCHEDULE

DATE:



TODAY'S PLAN

7 AM

8 AM

9 AM

10 AM

11 AM

12 PM

1 PM

2 PM

3 PM

4 PM

5 PM

6 PM

7 PM

8 PM

9 PM

10 PM

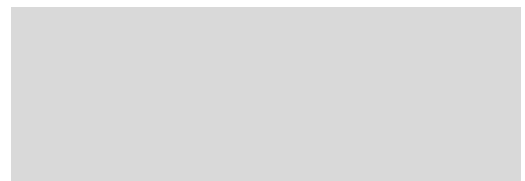
TO DO'S



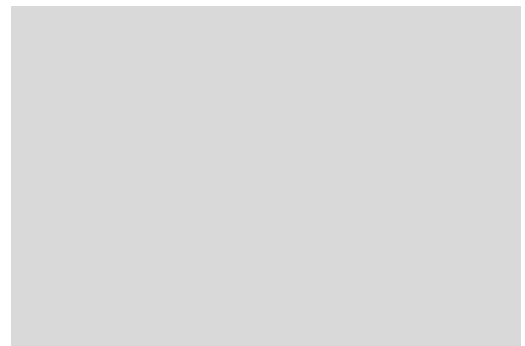
WATER INTAKE



EXERCISE



NOTES



DAILY PLANNER

DATE:



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TODAY'S GOAL

MEAL PLAN

B

L

D

WATER INTAKE



TODAY I AM GRATEFUL FOR

SOCIAL MEDIA IDEAS

MONTH:

WEEK OF:

	IMAGE	CAPTION	HASHTAGS	LOCAL HASHTAGS
MON				
TUES				
WED				
THU				
FRI				
SAT				
SUN				



SUPPLY LIST

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PROJECT PLANNER

ADDRESS:

DATE:



SUPPLIES NEEDED

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■ _____	■ _____

MEASUREMENTS

NOTES

NOTES

NOTES

BIRTHDAYS

JANUARY

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FEBRUARY

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MARCH

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APRIL

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JUNE

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JULY

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AUGUST

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EXPENSE TRACKER

DATE	CATEGORY	DESCRIPTION	AMOUNT
TOTAL:			

INCOME TRACKER

DATE	SOURCE	DESCRIPTION	AMOUNT
TOTAL:			

BILL TRACKER

BILL	DUE DATE	AMOUNT	PAID	METHOD
			TOTAL:	