Productivity Templates

Getting Started

How to Use These Templates:

Each template shows you the STRUCTURE and SYSTEM—not a specific tool.
You can build these in:
- Notion, Trello, Asana, ClickUp, Airtable
- Google Sheets, Excel
- Printable PDF (blank templates included)
- Your notebook/planner

For each template, you'll find:
- ✅ What it's for (the problem it solves)
- ✅ Structure (columns, fields, sections)
- ✅ Setup instructions for any tool
- ✅ Pro tips for maximum effectiveness

Quick Links:

Weekly Focus Planner

What it solves

Prevents overwhelm by helping you focus on your TOP 3 priorities each week (not a random to-do list).

Structure

Week of: [DATE]

This Week's Theme/Focus:
[One sentence - what is this week about?]

Top 3 Non-Negotiables:
1. [Must-complete task #1]
2. [Must-complete task #2]
3. [Must-complete task #3]

Secondary Tasks (if time allows):
- [ ] Task 4
- [ ] Task 5
- [ ] Task 6

Meetings/Appointments:
- Mon: [Time + what]
- Tue: [Time + what]
- Wed: [Time + what]
- Thu: [Time + what]
- Fri: [Time + what]

Content to Create This Week:
- [ ] [Platform + topic]
- [ ] [Platform + topic]
- [ ] [Platform + topic]

Revenue-Generating Activities:
- [ ] [Sales call, pitch, follow-up, launch, etc.]
- [ ] [Sales call, pitch, follow-up, launch, etc.]

End of Week Review:
- What worked?
- What didn't?
- What to adjust next week?

How to Build

In Notion/Digital Tool:
- Create a database with "Week" as the title
- Add text fields for each section
- Use checkboxes for tasks
- Duplicate template weekly

In Google Sheets:
- Column A: Section names (Week of, Top 3, etc.)
- Column B-H: Days of the week or task details
- Format with borders and bold headers
- Duplicate sheet each week

Printable:
- Create simple one-page layout
- Print weekly and fill by hand
- Keep in planner or binder

Pro Tips:

- Plan Sunday evening or Monday morning
- Review Friday afternoon
- Your "Top 3" should move the needle—not just busy work
- If something isn't urgent by Friday, it wasn't a real priority

Content Calendar (30-Day View)

What it solves

Eliminates daily "what should I post?" stress. Batch plan content so you're always ahead.

Structure

Month: [MONTH/YEAR]
Monthly Content Theme: [One focus topic for the month]

Date	Platform	Content Type	Topic /Hook	Status	Notes
Jan 1	Instagram	Carousel	[Topic]	✅ Posted	[Link/result]
Jan 1	Email	Newsletter	[Topic]	📝 Draft	[Due date]
Jan 2	Facebook	Single Post	[Topic]	⏰ Scheduled	[Schedule time]
Jan 3	Blog	Article	[Topic]	🚧 In Progress	[Word Count]

Status Key:
📝 Idea/Draft
🚧 In Progress
⏰ Scheduled
✅ Posted/Published
❌ Canceled/Skipped

Content Themes by Week:
- *Week 1: [Theme/focus]*
- *Week 2: [Theme/focus]*
- *Week 3: [Theme/focus]*
- *Week 4: [Theme/focus]*

Content Pillars (rotate these):
1. Education/How-To (40%)
2. Inspiration/Story (20%)
3. Behind-the-Scenes (20%)
4. Promotional (20%)

How to Build

In Notion:
- Create Calendar view database
- Properties: Date, Platform, Type, Topic, Status (select), Notes
- Toggle between calendar and table view
- Filter by platform or status

In Trello:
- Lists: Ideas → Draft → Scheduled → Posted
- Cards: Each piece of content
- Labels: Color-code by platform
- Due dates for publish dates

In Google Sheets:
- Columns as shown above
- Use dropdown data validation for Status
- Conditional formatting (color-code by status)
- Filter view by platform

Printable:
- Monthly grid calendar
- Write topics in each date box
- Use symbols for platform (IG=Instagram, E=Email, etc.)

Productivity Templates

Client/Project Tracker

What it solves

Keeps all client work organized so nothing falls through the cracks. Know exactly what's due when.

Structure

Client Name	Project Type	Start Date	Due Date	Status	Next Action	Revenue	Notes
Jane Doe	Website Design	Jan 5	Feb 2...	🚧 In Progress	Send revision 2	$2,500	Loves purple
ABC Co	Email Sequence	Jan 20...	Jan 20...	⏰ Starting Soon	Kickoff call 1/12	$500	5 emails
John Smith	Brand Package	Dec 2...	Jan 20...	✅ Completed	Request testimonial	$1,200	Referred by Sarah

Status Options:
💬 Inquiry/Lead
📝 Proposal Sent
⏰ Starting Soon
🚧 In Progress
⏸️ Waiting on Client
✅ Completed
❌ Canceled/Lost

Project Pipeline View:
Leads: [Number of inquiries]
Proposals Out: [Number awaiting decision]
Active Projects: [Currently working on]

Completed This Month: [Finished projects]
Total Revenue (Month): $[Amount]

How to Build

In Notion:
- Database with Client as title
- Properties: All columns above (use Select for Status)
- Create filtered views: Active Only, Completed, By Due Date
- Gallery view for visual project cards

In Trello:
- Lists: Leads → Proposals → Active → Waiting → Completed
- Each card = one client/project
- Use labels for project type
- Due dates and checklists within cards

In Airtable/Google Sheets:
- Table as shown above
- Filter and sort by status or due date
- Sum revenue column for totals
- Link to project folders/docs

Printable:
- Simple table format
- Update weekly
- File in binder by month

Productivity Templates

Revenue Tracker (Simple)

Productivity Templates

What it solves

Know exactly how much you're making (and spending) without complicated accounting software.

Structure

Month: [MONTH/YEAR]

Income Goal This Month: $ [Amount]

Date	Type	Amount	Client/Source	Status	Notes
Jan 5	Income	$500	Client: Jane Doe	✅ Paid	Website Project
Jan 7	Expense	-$29	ConvertKit	✅ Paid	Email Software
Jan 10th	Income	97	Product: Bundle	✅ Paid	Online Sale

Monthly Summary
Total Income: $ [Amount]
Total Expenses: $[Amount]
Net Profit: $[Amount]
Goal Progress: [x] % of goal reachded

Income By Source
Client Services: $[Amount] ([X]%)
Digital Products: $[Amount] ([X]%)
Other: $[Amount] ([X]%)

Top Expenses
1. [Category]: $[Amount]
2. [Category]: $[Amount]
3. [Category]: $[Amount]

Pro Tips

- Update weekly (Friday afternoon ritual)
- Separate personal and business
- Track even small expenses (they add up)
- Celebrate when you hit income goals!

Launch Checklist

What it solves

Never forget a step when launching a product, service, or campaign. Repeatable system for every launch.

Structure

Launch Name: [Product/Campaign Name]
Launch Date: [Date]
Goal: [Revenue target or # of sales]

2 Weeks Before:

- [ ] Finalize offer and pricing
- [ ] Create sales page
- [ ] Set up payment processing
- [ ] Write email sequence (5-7 emails)
- [ ] Create social media graphics (10-15)
- [ ] Film/record promo video or stories
- [ ] Set up tracking (analytics, pixels)
- [ ] Test entire funnel (opt-in to purchase)

1 Week Before:

- [ ] Schedule all emails
- [ ] Schedule social media posts
- [ ] Warm up email list (send value content)
- [ ] Reach out to affiliates/partners
- [ ] Prepare FAQ document
- [ ] Set up customer support system
- [ ] Create launch day checklist

Launch Day:

- [ ] Send launch email #1 (6am)
- [ ] Post on social media (morning)
- [ ] Share in relevant groups/communities
- [ ] Post Instagram stories throughout day
- [ ] Send launch email #2 (6pm)
- [ ] Monitor sales and celebrate wins
- [ ] Respond to comments/DMs/questions

During Launch (Days 2-5)

- [ ] Send daily email with different angle
- [ ] Share testimonials/results as they come in
- [ ] Post behind-the-scenes content
- [ ] Address objections in content
- [ ] Engage with comments/questions
- [ ] Track metrics daily

Last Day:

- [ ] Send "last chance" email (morning)
- [ ] Post urgency content on social
- [ ] Send final email (evening)
- [ ] Update sales page with deadline
- [ ] Stay available for questions

Post-Launch:

- [ ] Send thank you email to buyers
- [ ] Deliver product/service
- [ ] Request testimonials
- [ ] Analyze results (what worked, what didn't)
- [ ] Plan next launch improvements
- [ ] Celebrate and rest!

How to Build It:

In Any Tool:

- Copy this checklist structure
- Add checkboxes for each item
- Customize based on your launch type
- Duplicate for each new launch

Time Blocking Schedule

What it solves

Stop context-switching. Batch similar tasks and protect your focus time.

Structure

My Ideal Week:

Time	Monday	Tuesday	Wednesday	Thursday	Friday
8-9 am	Email/Admin	Email/Admin	Email/Admin	Email/Admin	Email/Admin
9-12 pm	Client Work	Content Creation	Client Work	Content Creation	CEO Time
12-1 pm	Lunch	Lunch	Lunch	Lunch	Lunch
1-3 PM	Client Calls	Marketing	Client Calls	Marketing	Admin/Catch up
3-5 pm	Emails/Wrap-up	Social Media	Emails/Wrap Up	Social Media	Week Planning

Color Code

🔵 Focus Work (deep work, no interruptions)
🟢 Meetings/Calls (calendar blocking)
🟡 Marketing/Content (batch creation)
🟠 Admin (email, invoices, etc.)
⚪ Buffer/Flex Time

Non-Negotiable Blocks:

🚫 No meetings before 10am
🚫 No work after 6pm
🚫 Lunch is sacred (away from desk)
🚫 Friday afternoons = no calls

Theme Days (Alternative Approach)

Monday: CEO Day (strategy, planning, analytics)
Tuesday: Content Creation Day (batch everything)
Wednesday: Client Delivery Day (projects, work)
Thursday: Marketing Day (social, email, networking)
Friday: Admin & Wrap-Up Day (finances, systems)

Pro Tips

- Start with YOUR energy patterns (morning person? afternoon?)
- Build in buffer time (things run over)
- Batch similar tasks (all calls one day, all content another)
- Protect focus time fiercely (no meetings during deep work)
- Review and adjust monthly

Social Media Content Planner

What it solves

Never run out of content ideas. Always know what to post and when.

Structure

Platform: [Instagram/Facebook/LinkedIn/etc.]
Month: [Month/Year]

Content Pillars (What You Talk About):
1. [Pillar #1 - e.g., Email Marketing Tips] - 40%
2. [Pillar #2 - e.g., Behind-the-Scenes] - 20%
3. [Pillar #3 - e.g., Client Wins] - 20%
4. [Pillar #4 - e.g., Offers/Promotions] - 20%

Content Format Mix:
- Educational carousels: 3x/week
- Single image posts: 2x/week
- Reels/Video: 2x/week
- Stories: Daily

Idea	Pillar	Format	Hook/Angle	Status	Scheduled
“5 email subject lines that get opened	Tips	Carousel	Curiosity Hook	✅ Created	Jan 5
Behind-the-scenes of my morning routine	BTS	Reel	Relatable	📝 Idea	Jan 7
Client transformation: Jane's website	Wins	Single Post	Before/After	🚧 In Progress	Jan 2010

Posting Schedule:
Monday: Educational (carousel or tip)
Tuesday: Story/Personal connection
Wednesday: Educational (how-to)
Thursday: Engagement (question, poll)
Friday: Inspiration or client win
Weekend: Behind-the-scenes or personal

Engagement Plan:
- Respond to all comments within 24 hours
- Engage with 10 accounts in your niche daily
- Share 3-5 stories daily (mix of content and personal)

Pro Tips
- Batch create 1-2 weeks at a time
- Repurpose: Turn one topic into 3-5 different posts
- Save high-performing posts to reuse (remix in 60-90 days)
- Mix value (80%) and promotion (20%)

Goal Tracker (90-Day)

What it solves

Big annual goals feel overwhelming. Break them into 90-day sprints with weekly actions.

Structure

Quarter: [Q1/Q2/Q3/Q4] [YEAR]

90-Day Goal (One Sentence):
[Example: "Launch new $97 product and generate $5K in revenue"**]**

Why This Goal Matters:
[Your motivation - make it personal and emotional]

Success Metrics:

- [ ] Revenue: $[Target amount]
- [ ] New clients/customers: [Number]
- [ ] Email list growth: [Number]
- [ ] [Other metric relevant to goal]

Milestones (Monthly Breakdown):

Month 1: [Focus Area]

- [ ] Key result #1
- [ ] Key result #2
- [ ] Key result #3

Month 2: [Focus Area]

- [ ] Key result #1
- [ ] Key result #2
- [ ] Key result #3

Month 3: [Focus Area]

- [ ] Key result #1
- [ ] Key result #2
- [ ] Key result #3

Weekly Actions:

(What to do THIS week):

- [ ] Action that moves the needle
- [ ] Action that moves the needle
- [ ] Action that moves the needle

Accountability:

- Who's supporting you? [Name/community]
- Weekly check-in: [Day/time]
- Reward when complete: [Your celebration]

End of 90 Days Review:

- Did you hit your goal? [Yes/No/Partial]
- What worked?
- What didn't?
- What to do differently next quarter?

Pro Tips:

- Choose ONE big goal per quarter (not 10)
- Review weekly (Friday afternoons)
- Adjust as needed (goals can evolve)
- Celebrate small wins along the way
- If you don't hit it, analyze why—don't just feel guilty

Meeting Notes Template

What it solves

Remember what was discussed, decided, and what needs to happen next. Professional and organized.

Structure

Meeting: [Type - Discovery Call, Client Check-In, Strategy Session]
Date: [Date & Time]
Attendees: [Names]

Meeting Purpose:
[One sentence - why are we meeting?]

Agenda

1. [Topic 1]
2. [Topic 2]
3. [Topic 3]

Discussion Notes:

- [Key point discussed]
- [Decision made]
- [Question asked]
- [Idea shared]

Task	Owner	Due Date	Status
Send Proposal	You	Jan 20...	⏰ In Progress
Provide brand assets	Client	Jan 10th	Waiting
Schedule follow up	You	Jan 20th	To Do

Decisions Made:

- [Decision 1]
- [Decision 2]

Next Steps:

- [ ] [Immediate next action]
- [ ] [Follow-up task]
- [ ] [Future consideration]

Next Meeting: [Date/Time] - [Purpose]

Personal Notes (Private):
[Anything to remember - preferences, personal details, red flags]

Pro Tips:

- Take notes during (or immediately after) meeting
- Send action items recap to attendees within 24 hours
- Review before next meeting with same person
- Keep personal notes separate (private system)

Productivity Templates

Product/Service Inventory

What it solves

Know exactly what you offer, at what price, and which products are actually profitable.

Structure

Last Updated: [Date]

Offer Name	Type	Price	Time to Deliver	Revenue (Monthly)	Profit Margin	Status
Website Design	Service	$2,500	4 Weeks	$5000 (2 clients)	70%	Active
Digital Guide	Digital Product	$7	Instant	$140 (20 sales)	95%	Active
Toolkit	Digital Product	$97	Instant	$970 (10 sales)	90%	Active

Metrics:
Total Monthly Revenue: $[Amount]
Most Profitable Offer: [Name]
Most Popular Offer: [Name]
Highest Profit Margin: [Name]

Offers to:

- **Keep:** [Which ones and why]
- **Improve:** [Which ones need work]
- **Retire:** [Which ones aren't worth it]
- **Create:** [Gaps to fill]

Pricing Strategy:

- Entry offer: $[X]
- Mid-tier offer: $[X]
- Premium offer: $[X]

Pro Tips

- Review quarterly (what's working?)
- Track time spent vs. revenue (your hourly rate)
- Don't be afraid to retire underperforming offers
- Bundle low-sellers with bestsellers
- Raise prices on high-demand offers

🎯 HOW TO USE ALL 10 TEMPLATES

Getting Started (Week 1):

1. Set up Template #1 (Weekly Planner) - Start planning immediately
2. Set up Template #6 (Time Blocking) - Organize your week
3. Set up Template #3 (Client Tracker) - If you have clients

Month 1:

1. Add Template #2 (Content Calendar) - Stop scrambling for content
2. Add Template #4 (Revenue Tracker) - Know your numbers
3. Add Template #7 (Social Media Planner) - Batch your content

As Needed:

1. Template #5 (Launch Checklist) - When launching anything
2. Template #8 (Goal Tracker) - Start of each quarter
3. Template #9 (Meeting Notes) - Before your next meeting
4. Template #10 (Product Inventory) - Quarterly review

📁 BONUS: Simple Digital Filing System

Organize your digital life:

📁 MY BUSINESS
- 📁 Clients
  - 📁 [Client Name]
    - Contracts
    - Project Files
    - Meeting Notes
- 📁 Content
  - 📁 Blog Posts
  - 📁 Social Media
  - 📁 Email Newsletters
- 📁 Finances
  - Income Tracker
  - Expense Receipts
  - Invoices
- 📁 Products
  - 📁 [Product Name]
    - Sales Page
    - Product Files
    - Marketing Materials
- 📁 Systems & Templates
  - All 10 templates from this pack

Apply same structure to:
- Google Drive
- Dropbox
- Computer folders
- Notion workspace

✅ SETUP CHECKLIST

Pick Your Tool(s):

- [ ] Notion (all-in-one)
- [ ] Trello (visual boards)
- [ ] Google Sheets (simple spreadsheets)
- [ ] Printable (paper system)
- [ ] Mix (different tools for different templates)

Priority Setup (Do these first):

- [ ] Weekly Planner
- [ ] Time Blocking Schedule
- [ ] Revenue Tracker

Add When Ready:

- [ ] Content Calendar
- [ ] Client Tracker
- [ ] Social Media Planner

Advanced (Later):

- [ ] Launch Checklist
- [ ] Goal Tracker
- [ ] Meeting Notes
- [ ] Product Inventory

Remember: Start simple. Don't build all 10 at once. Pick 1-2, use them for a week, then add more.