

THE
ASANA MASTERCLASS

Apothecary

BY  J&L

Action Steps

Module No.3: Systems

Weekly Task List / Managing Time

- Create your weekly schedule in Asana (build in a weekly schedule master)
- Schedule your weekly review
- Determine if you'll use template for week-to-week use or only as a stand-alone template that you check-in with

To-Do's & Keeping Track of Tasks

- Go to My Tasks and put tasks in for today, upcoming and/or later
- Establish a daily routine to visit your tasks in the morning and at the end of the day - put in calendar

Finances

- Build out a financial project and create a template for the financial categories you decide to use
- Examine and write a list of the areas of your business that you can easily track your finances and expenses.
- Populate your project with your tasks

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Module No.3: Systems (cont.)

Sales Pipeline

- Create your sales pipeline and template
- Under each task and category, write your notes as to what happens at each stage
 - Note where your contract can be found
 - Conference line phone number or skype name
- Make sure you're clear about
 - What happens after NO
 - What happens after YES
 - What offers are you inviting them to

New Clients / Managing Clients

- Outline client intake process
- Create or modify the template you have for your clients
- Input any recent past clients, to practice maintaining the follow up

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Module No.3: Systems (cont.)

Project Launch

- If you have a launch coming up, briefly outline steps you feel you're going to take
- Make a template for launches or modify the template we have (can be used for programs, courses, intensives, etc.)
- Add team members, if necessary

Social Media

- Create template or modify our template for your social media channels
- Set aside 15-20 mins a day to work on social media creation
- Write 2 days of content right now

Marketing

- Create list all the marketing aspects in your business and create templates for each (i.e., social media, blogging, podcast, etc.)
- Take 15 minutes and work on one marketing aspect
Set due dates and reminders

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Module No.3: Systems (cont.)

Nurturing Relationships

- Create a list of those who you want to follow up with
- Create your template
- Using the template - input a handful of names of people you'd like to start following up with today!

Team Management

- Create business asana practices project
- Add team members to your workspace or specific projects
- Outline responsibilities in your business for certain team members - input into Asana
- Setup weekly meeting schedule and outline
- Create a quick video for your team to review when you hire someone new and/or when you decide to introduce your team to Asana. Explain how to use the system, navigate it with ease and understand your expectations.

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Module No.3: Systems (cont.)

Business Management

- Make a list of "management" tasks in business (areas to work "on" business)
- Create project for Business Management
- Delegate tasks which fall into management and which ones your team can help with (metrics, finances, etc)
- Put recurring due dates (daily, weekly, monthly, quarterly, annually) and make a habit of visiting this project weekly
- Schedule team meeting, if necessary, to go through this project and get your team on board