Alicia's Top 5 Productivity Tools Essential to Get More Done in Less Time

Hi Fellow Fit Pro!

As a business owner, we wear so many different hats.

It can be a challenge to stay organized and focused on the high-leverage tasks that will move your business forward and help you to make more money and help more people.

It's all too easy to drown in the daily grind, get sidetracked, and end up plateauing in your business.

Keeping track of leads, prioritizing your tasks, organizing contacts, managing clients, and all of the other million and one things we do as business owners can get overwhelming.

Overwhelm can quickly lead to procrastination. Procrastination leads to massive amounts of lost time and lost opportunity.

In this report I'm going to share 5 tools that I've personally created and use in my own fitness business.

My goal is to help YOU become more productive, get and stay organized, and make you more money in your business. These tools will help you to accomplish all of that.

I like tools that are simple AND effective… because the more complicated they are, the less likely we are to actually use them.

My Top 5 Productivity Tools:

1. My Personal Task & Productivity Worksheet
2. Prospect Follow-Up System (Google Doc)
3. New Client System (Google Doc)
4. Event Checklist
5. Client Attendance Tracker

It's time to kick overwhelm and procrastination to the curb! Time to get productive….

How to Use These Tools:

Every business is different and has different needs. You can use these tools exactly, or customize them as needed for your business.

The most important thing to remember is to take ACTION!

Good "ideas" are absolutely worthless unless you act on them.

Remember: ***The longer you wait to do something, the greater the odds that you will never actually do it.***

If you find a tool that you would like to use, begin implementing ASAP.

Happy Productivitizing ☺
Alicia

www.FitProEssentials.com

P.S. If you want help organizing and becoming more productive in your business, ***CLICK HERE*** *to set up a free strategy call!*

Tool #1: Productivity Worksheet

I'm still a pen and paper kind of girl. I keep most everything on my computer, but I still love keeping my Daily Productivity Sheet on my desk in front of me.

When I started using this worksheet (*on the following page*) and sticking to the plan I set for myself, I became incredibly productive.

The sheet works hand in hand with the Pomodoro Method. Pomodoro's are 30-minute time blocks with *either* 25 minutes of focused work and 5 minutes of rest, or 20 minutes of focused work and 10 minutes of rest. (**Each 30-min block is considered a Pomodoro.**)

I break my larger projects into smaller more manageable tasks that can be done in 25-minute time blocks. This way, there is no overwhelm and it's much more effective for time management.

Here's how to use the Worksheet:

1. **First, schedule in any fixed appointments, meetings, or training** you have that day. Don't forget to include driving time, eating time, and your own workout.

2. **Next, identify your task of highest leverage for each day.** Basically, if you got nothing else done, this would be the one thing that is most important to move your business forward. Fill this in in the box on the right of the worksheet and then mark in your schedule when you'll be working on this task. (Break into multiple Pomodoro blocks if necessary.)

3. **List out your daily tasks** (including personal) that you need to get done that day. (Break into multiple Pomodoro blocks if necessary.) This will give you a much better idea on how long it will actually take you to complete a task.

4. **Fill in the remainder of your Pomodoro Blocks** in the schedule. In general, I give myself a "rest block" for every 2-3 "focus" blocks.

Tips for Success:

- I ALWAYS complete my Productivity Worksheet for the following day the previous night.
- Don't forget to block off time for planning and review.
- Remember everything on your "Task List" is NOT created equal! Make sure to schedule in your tasks of highest leverage early in the day!
- Don't forget to schedule in your friends and family time.
- Prevent burn-out and don't work through your scheduled rest times.

More Resources:

- Book Recommendation: The One Thing, by Gary Keller
- Free Pomodoro Timer: http://www.marinaratimer.com

"What 1 Thing can I do such that by doing it everything else will be easier or unnecessary?"

Time	Activity
5 am	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	
9	
9:30	
10	
10:30	
11	
11:30	
12	
12:30	
1	
1:30	
2	
2:30	
3	
3:30	
4	
4:30	
5	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	

Date:

Today's ONE Big Thing:
(highest leverage)

Today's Tasks:
(What's the highest & best use of my time?)

Tool #2: Prospect Follow-Up System

Before we started tracking our leads with this system, it was really hard to keep up with all of our prospects.

We didn't have a system in place and there were some people we never followed up with because we lost track of them.

We were spending a lot of time and money to get new clients, and then we were dropping the ball on converting them to a class trial or PT consult.

This can especially true if you have multiple people answering the phone or responding to emails.

As a business owner, you want to be able to look in one place and see all of the leads you have in your business and where you are in the process of converting them into clients.

This is a quick and easy way to track all of your leads and prospects in one place.

It will also help you to track where people heard about you so you know which marketing dollars are working for you and which aren't. This also makes it easy to calculate your prospect to client conversion percentage.

We use Google Docs for this system. It's a 100% FREE tool. If you don't have an account yet, go to: https://docs.google.com and set one up.

Except for our client billing and management software, **Aweber** (email provider), and WordPress, we use Google Docs to run just about every other aspect of our business. You can share and edit your docs with your team or clients, or keep them private so only you can see them.

Here's how to use this Prospect Follow-Up System:

1. **First, open your Google Drive** by clicking: docs.google.com

2. **Create a NEW Spreadsheet** (Click CREATE in the top left corner, then click SPREADSHEET)

3. **Copy and Paste** the content from my Prospect Follow-Up System into your own Spreadsheet.
   CLICK HERE TO ACCESS DOC <----

4. **Edit your Prospect Follow-Up System** based on the way you would like to follow-up with all leads. You can add even more follow-up events if desired!

5. **Train admin** or other staff who will be using the system once you're familiar with it.

6. **Share the doc** with your admin or other staff who needs access.

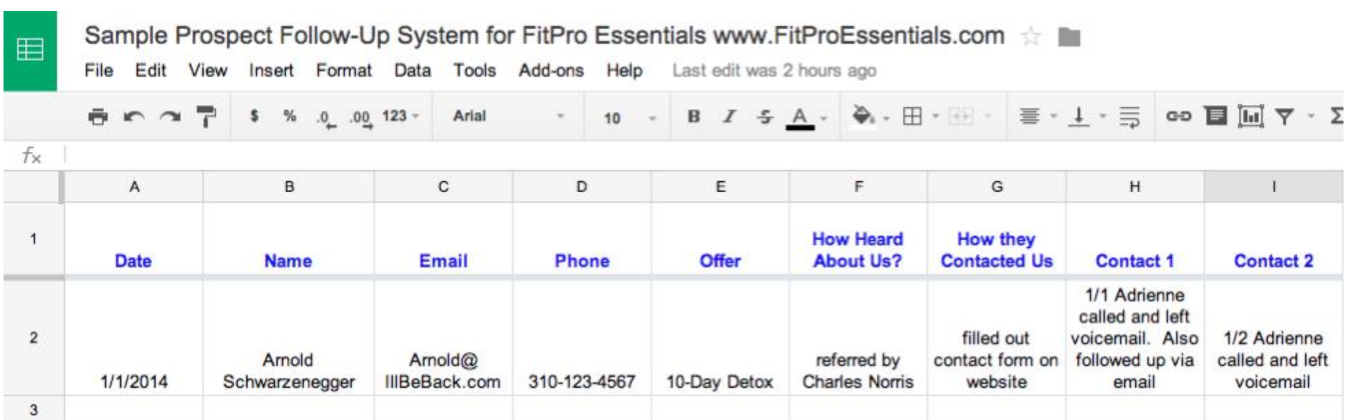
Below is a screen shot of our Prospect Follow-Up System on Google Docs.

In my business, it's set up so that only my assistant and I can access and edit the document. At any time, either of us can jump on the doc and follow-up with the prospect.

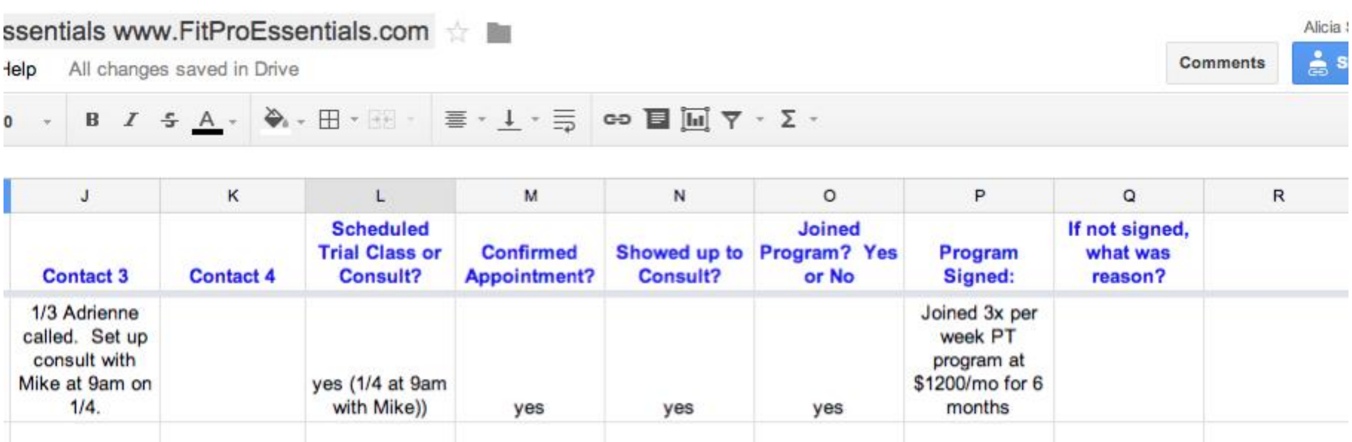
Tips for Success:

- Leave notes for yourself or other team members if you need to remember anything specific.
- Create phone and email scripts so each step is consistent for all follow-ups.
- Have predetermined amounts of time between follow-ups. For example: if a lead contacts us via email, we follow up with them that same day. If we don't hear back, we contact them again the following day, and so on.
- When sharing your Google Docs, you have multiple options as to who can view/edit the doc. Make sure you always select the correct option.
- Make sure to set a reminder to make follow-up calls or send follow-up emails.
- (Systems like Infusionsoft can help to automate this process. If you're not up for the price tag, this system is a fantastic option!)
- Create separate tabs for each month at the bottom of the doc to help keep organized!

You can access a live read-only version here:
https://docs.google.com/spreadsheets/d/11NCs27SVD2wqPqgmwWxYzCd6DIsFhpiKwPG_xYuHmQM/edit?usp=sharing



	A	B	C	D	E	F	G	H	I
1	Date	Name	Email	Phone	Offer	How Heard About Us?	How they Contacted Us	Contact 1	Contact 2
2	1/1/2014	Arnold Schwarzenegger	Arnold@IllBeBack.com	310-123-4567	10-Day Detox	referred by Charles Norris	filled out contact form on website	1/1 Adrienne called and left voicemail. Also followed up via email	1/2 Adrienne called and left voicemail
3									



J	K	L	M	N	O	P	Q	R
Contact 3	Contact 4	Scheduled Trial Class or Consult?	Confirmed Appointment?	Showed up to Consult?	Joined Program? Yes or No	Program Signed:	If not signed, what was reason?	
1/3 Adrienne called. Set up consult with Mike at 9am on 1/4.		yes (1/4 at 9am with Mike))	yes	yes	yes	Joined 3x per week PT program at $1200/mo for 6 months		

Tool #3: New Client System

We use our "New Client System" to make sure we welcome our new clients the way they deserve to be welcomed!

We place a tremendous value on over-delivering and exceeding our clients' expectations. You're about to get a glimpse into the process we take all of our new members through.

This system is also run on Google Docs.

Here's how to use this New Client System:

1. **First, open your Google Drive** by clicking: docs.google.com

2. **Create a NEW Spreadsheet** (Click CREATE in the top left corner, then click SPREADSHEET)

3. **Copy and Paste** the content from my New Client System into your own Spreadsheet.
   CLICK HERE TO ACCESS DOC <----

4. **Edit your New Client System** based on the process you wish to take all of your new clients through! Keep in mind you may have different processes for different types of members.

5. **Train admin** or other staff who will be using the system.

6. **Share the doc** with your admin or other staff who needs access.

Tips for Success:

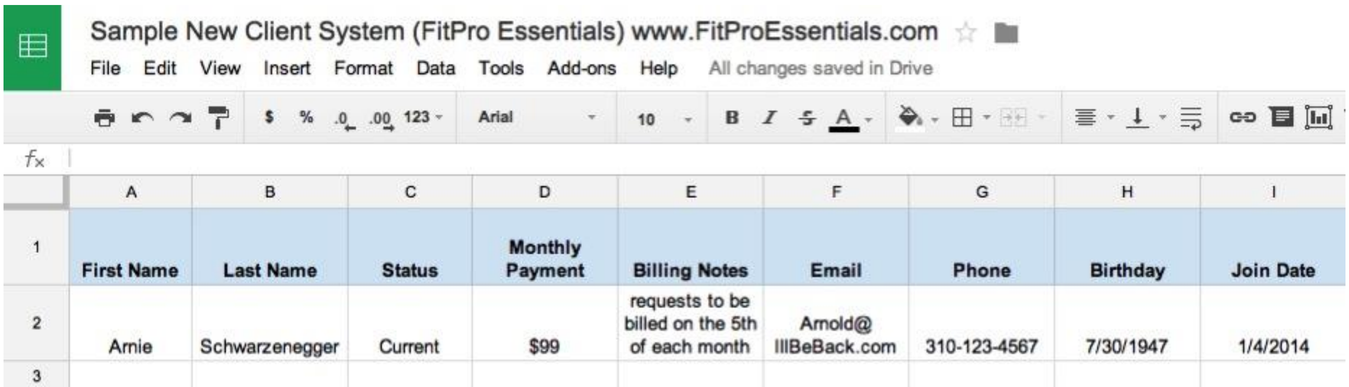
- Leave notes for yourself or other team members if you need to remember anything specific.
- Create a training manual for your assistant that outlines each step and how it should be done. (including deadlines for task completion.)
- When sharing your Google Docs, you have multiple options as to who can view/edit the doc. Make sure you always select the correct option.
- Make sure to create a reminder for to complete tasks in your system.
- Review weekly to make sure all tasks are completed!

On the following page is a screen shot of our New Client System on Google Docs.

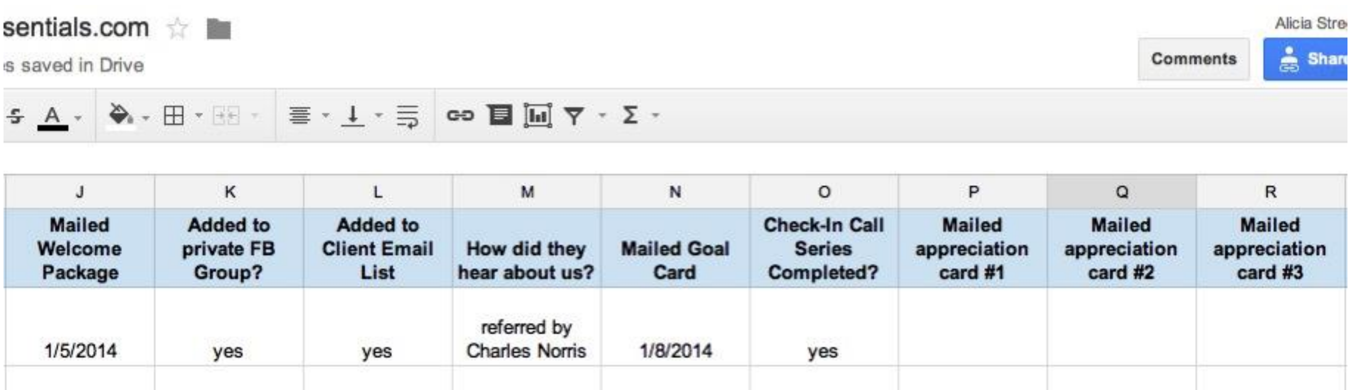
In my business, it's set up so that only my assistant and I can access and edit the document. At any time, either of us can jump on the doc and follow-up with the client.

You can access a live read-only version of our New Client System:
https://docs.google.com/spreadsheets/d/1-3usHGA-XpqEtxI-H_MhjN8pzSM9eLCC8VURZQZ031U/edit?usp=sharing

New Client System Screen Shots:



	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Status	Monthly Payment	Billing Notes	Email	Phone	Birthday	Join Date
2	Arnie	Schwarzenegger	Current	$99	requests to be billed on the 5th of each month	Arnold@IllBeBack.com	310-123-4567	7/30/1947	1/4/2014
3									



J	K	L	M	N	O	P	Q	R
Mailed Welcome Package	Added to private FB Group?	Added to Client Email List	How did they hear about us?	Mailed Goal Card	Check-In Call Series Completed?	Mailed appreciation card #1	Mailed appreciation card #2	Mailed appreciation card #3
1/5/2014	yes	yes	referred by Charles Norris	1/8/2014	yes			

Tool #4: Event Checklist

When I first started my business, I'd have the best intentions of getting things done ahead of time.

When I ran events like charity boot camps, client appreciation socials, or workshops and seminars, I inevitably ended up doing things last minute.

It would be stressful and sometimes I'd end up running around like a chicken with my head cut off.

Finally, I smartened up and created an "Event Checklist" that outlined everything I needed to get done. This way I'd be able to stay ahead of the game and delegate necessary tasks.

On the following page is the *exact* Event Checklist that I use to this day.

We keep a running binder filled with these sheets as an easy reference for past events and pulling up important contact information.

Tips for Success:

- The way you run events may be different than mine. That's ok! Customize the doc as you see fit to cover all of your bases and make sure you're prepared for your upcoming events.
- I'd recommend keeping a binder with all of your Event Checklists in it for easy reference in case you'd like to run the event again. This way you'll have everything you need right in front of you. (It's also a great reference for creating your yearly calendar for the upcoming year.)

EVENT: DATE:		
IMPORTANT CONTACT INFO: **CHARITY: YES / NO**		
Other Notes/Details:		
TASKS & DEADLINES **(ASSIGN DEADLINE TO EACH TASK)**		
Facebook	a. Create a Facebook Event b. Share on profile and on fan page + fb group	☐
Meet-Up	Create an event on Meet-Up	☐
Email List	Email prospects/clients:	☐
Supplies /Goodie Bags	(ex handouts, snacks, pens, table cloth, etc.)	☐
Ads / Marketing	(Ex. Press Release, Print Ads, Facebook Ads, etc):	☐
UPDATING AND TRACKING		
Email Strategy	Dates to email for teaser / promotion / last chance (enter in summary for each planned email) 1. Date: 2. Date: 3. Date: 4. Date: 5. Date:	☐
Facebook Update	Update facebook posts 2-3x per day	☐
POST EVENT		
Send Thank You Cards / Thank You Email		☐
Post Pics to Site/ Facebook		☐
RESULTS		
Attendance	Expected Attendance: Actual Attendance: New Clients = Current Clients =	☐
Finances	Total Income Generated (+): Total Raised for Charity (if applicable): Total Expenses to Run Event (-): Net Result (total):	☐
Overall Success	Should we run this promotion/event again? (yes/no, if so WHEN________)	☐

Tool #5: Client Attendance Tracker

Before I had Zen Planner (which I currently use to track attendance), I used this easy client attendance tracker I made in Google Docs.

If you run group classes and you're *not* tracking attendance… put this on your priority list.

Making MIA calls when clients miss a few classes in a row is a MUST.

At Forte Fitness (my business), if a client misses more than 3 classes in a row, they get a phone call from our "Client Happiness Specialist!"

MIA calls will not only separate you from your competition, but you're clients will truly appreciate the call.

If they're falling off the wagon, then you can nip the issue in the bud before they end up canceling their membership. If they're having family issues or aren't feeling well, then they will greatly appreciate your call and well wishes.

Our MIA calls are a MASSIVE reason why our retention rates are over 95%.

Not only do we get our clients better results because they are in class and getting more motivation; but it also keeps our marketing costs down because we keep the majority of our clients and don't have to spend as much on marketing.

In fact, if our clients are going out of town, they will publically announce it in our private Facebook Group so they don't get MIA'ed!

Our clients *know* that we truly love and appreciate them. Keeping attendance and noticing when they are missing is a very important part of our business.

Tips for Success:

- Make sure you create an MIA phone script before you make any calls.
- To use this doc in your own business, simply copy and paste the columns into your own Google doc! Reference Tool #2 and Tool #3 if you need further directions on creating a new spreadsheet in Google Docs. ***(Note the Monthly tabs at the bottom of the Google doc to keep your months organized!)***

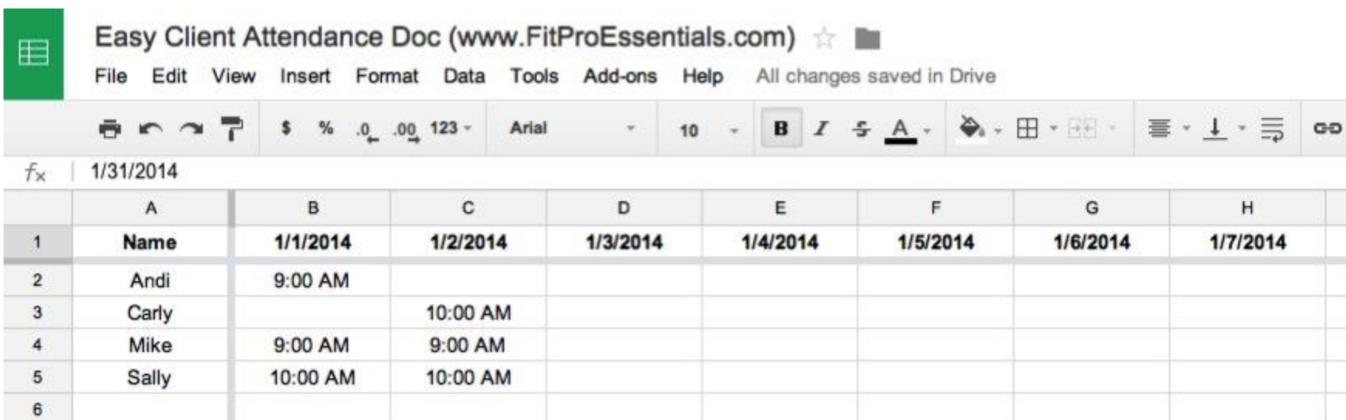
- I'd recommend keeping an accurate "Current Client" list on Google Docs. This will help you to always have an accurate snapshot of your current client numbers. Once you have this doc in place, adding your clients to the attendance doc is easy! Just copy and paste your client list right into your Google doc.

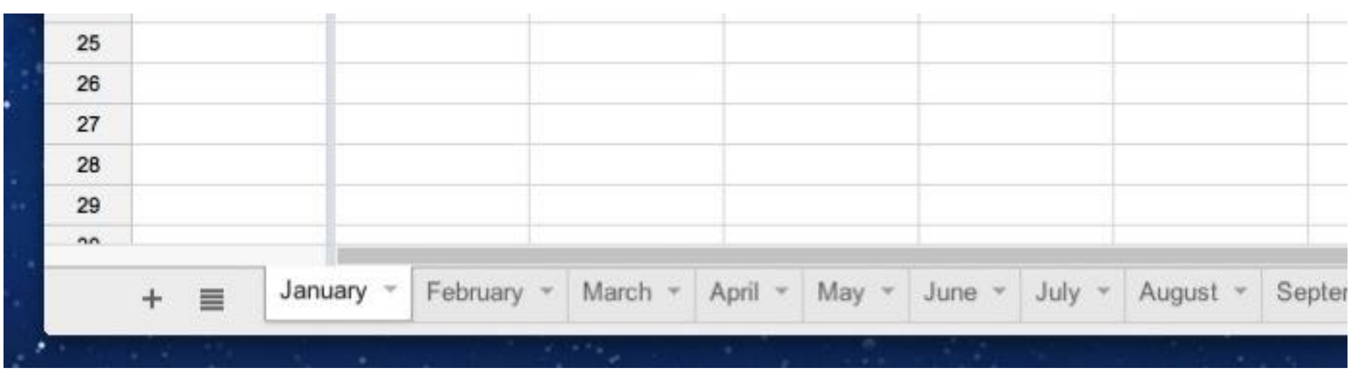
- In the "date" column, you can simply mark an "x" as attended. Or, if you want to get more specific, you can enter in a specific class time like "9 am."

- If you have more than 50-75 clients, I would strongly recommend you invest in client management software like Zen Planner. (I personally like it better than Mind Body). As you grow, your business will be scalable and more easily managed.

You can access a live read-only version of our New Client System:
https://docs.google.com/spreadsheets/d/1l8HJ0eA6LgXI0qSVb3ZGBBIgH8uuzyyHh2lSgewZwJg/edit?usp=sharing

Easy Attendance Tracker Screen Shots:





Additional Resources for Productivity:

We use additional tools in our business to increase our productivity. They are:

Aweber: I've been using Aweber for years as my email marketing service. The layouts are clean and the software is easy to use. It's also reliable and the customer service is very helpful. Cost: $19-$79+ per month. http://www.aweber.com

Dropbox: Great for securely sharing and storing files of any size. We keep our training manuals, workouts, and other important docs always accessible in our Team Folder. This way everyone always has access to up-to-date information.
Cost: FREE! *(Or you can upgrade for up to $15 per month.)* https://www.dropbox.com

Lead Pages: This software creates landing pages in minutes! You don't have a lot of customization options, but they're simple and effective (which I really like!)
Cost: $37-$67 per month. https://www.leadpages.net

Wunderlist: This is the task list software we use. I can assign my team members tasks. I can also see when they've completed a task on their list.

There's also an app for your phone, so you always have an up-to-date to-do list! (It's also great for keeping a grocery list and telling my husband what he needs to pick up! ☺)
Cost: FREE! *(Or you can upgrade for $4.99 per month.)* https://www.wunderlist.com

Zen Planner: This is the client management software that we use. It's very intuitive and user-friendly. It handles all of our recurring billing, keeps track of attendance, and has great reporting features. Cost: $55-$130 per month. http://zenplanner.com