

2020 Reboot Action Plan EXAMPLE

NAME Sally Myer DATE 6-17-20

TIME



WHAT	WHO
Spend weeknights and weekends home and take Fridays off	Me
Write down and delegate 5 daily time-consuming tasks	Mary
Schedule 30 min "buffer time" between meetings	Jessica
Resolve time tracking issues	Me
Reduce time on quick projects	Thomas
Schedule bi-weekly "fun" with staff on shared Calendar	Bob
Revise and update time with clients	Jessica
Schedule non-client related tasks on calendar	Mary
Create and communicate 5-hour reply time standard	Tom

OPERATIONS



WHAT	WHO
Train John to take over for Karen's role (document everything)	Joe
Look into A.I. programs to do automatically	Tim
Create plan to get website updated	Bob
Set up score card to track weekly data	Mary
Create system for onboarding - talk to Jef	Me
Create documentation for how we use task managers	Mary
Create systems to prevent chaos	Me
Hire a social media manager	Jessica
Sync cloud to Amy's computer	Tim

SALES



WHAT	WHO
Gather metrics from last year to review trends	Jessica
Create referral incentives	Karen
Replicate March's sales spike	Me
Find new software to track prospects	Mary
Find 2 new referral sources	Bob
Set up creative team meeting re: services	Jessica
Get tracking data to see who are repeat clients	Thomas
Link data from online ad traffic to sales data	Joe
Create incentives to bring new clients in during slow season	Tim

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PEOPLE



WHAT	WHO
Eat dinner at home 3x week	Me
Set up weekly huddle	Joe
Schedule a date night with spouse	Me
Set up team chat platform for workday	Thomas
Talk with David - performance is lower than usual	Me
Interview two applicants for social media manage	Jessica
Meet in-person with clients 4x week	Mary
Plan team lunches for the year	Mary
Schedule lunch with 2 referral sources	Mary

HEALTH & SPIRIT



WHAT	WHO
Spend quality time with extended family	Me and spouse
Create better sleep habits - in bed at 10pm	Me
Schedule annual doctors appointments	Mary
Exercise 3x per week for 30 minutes	Me
Prioritize relaxing activities (rediscover hobbies)	Me
Schedule vacations for the year	Me and spouse
Stop drinking soda	Me
Read one hour a week	Me
Volunteer to host small group social	Me and spouse

MONEY



WHAT	WHO
Follow up on unpaid invoices	Jessica
Set aside monthly deposit for a new building	Me
Contact loan officer to refinance	Me
Set up college savings plan	Me
Pay off car	Me
Set up monthly auto-debit for investment account	Me
Schedule financial review	Mary
Review monthly expenses with spouse	Me and spouse
Set up auto-pay for cleaning service	Mary

2020 Reboot Action Plan

NAME _____ DATE _____

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WHAT	WHO

OPERATIONS



WHAT	WHO

SALES



WHAT	WHO

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PEOPLE



WHAT	WHO

HEALTH & SPIRIT



WHAT	WHO

MONEY



WHAT	WHO