

MODULE 10

# TIME MANAGEMENT & PRODUCTIVITY

The Coach School



Workbook

ALLI WORTHINGTON

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# Time Management & Productivity

*It turns out the secret to making progress in your success as a coach and business owner is found in how you manage your time and in what systems you build. In this module, we'll help you determine what systems you need and how to implement them.*

## Lesson Checklist:

- Training 10.1 : Systems are Sexy
- Training 10.2 : How to Automate Your Client Scheduling
- Training 10.3 : How to Get Stuff Done

# Systems are Sexy

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Time management is essential because in order to grow your business well, you need to use your time well. In his book, *Atomic Habits*, James Clear says it this way: "If you want better results, forget about setting goals, focus on your systems."

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When I say the word systems, what comes to mind? Is it something complicated and boring? Is it the system used to make your morning coffee? Is it the systems put in place to keep you safe in the workplace? OR do you think of the systems needed to run your business?

**Take a minute to write down what comes to mind when you think of systems.**

**If you're already using systems in your coaching business, what systems are you using?**

**Reminder:** A system is a combination of tools and techniques that work together to make something happen or to make you more productive.

As we work through this module, we'll talk about examples of good systems and the steps needed to create those good systems.

## ► *Stop Doing List*

The first step to creating good systems is to remove anything that's hindering you from moving forward in business. You need to create a "Stop Doing List." Ask yourself the following questions as you create your list:

- What do I need to stop doing in order to become more productive in my business?
- What am I saying yes to (out of guilt or obligation) that I don't actually want to do?

You have permission to drop activities and responsibilities that you don't have time for as you're building your business.

**Spend the next few minutes creating a "Stop Doing List" below.** As you create your list, really think about what's preventing you from moving your business forward.

Take this list and put it in a visible space. Let it serve as a reminder that it's okay to say no.



Stop  
Doing  
List

## ► *Time Leaks*

Once you've created your list of things you're allowed to say NO to, it's time to think a little deeper about what's taking away from time to build your business. Time leaks are the times and places in our day where we waste time and get nothing done.

**Some examples of time leaks include:**

- Scrolling social media
- Doing household tasks when you should be focused on work
- Watching Youtube videos about cute animals (that's my time leak!)
- Reading, writing and organizing email (believe it or not!)

Now just as you did with the Stop Doing List, spend the next few minutes creating a list of time leaks.



► *M.I.T's (Most Important Tasks)*

Now that you've identified what's stealing your time, let's identify your MITs (Most Important Tasks). These are the tasks that are going to propel your business forward. In the beginning, this list might be overwhelming with 15-20 tasks, but don't let that discourage you.

**What tasks are most important right now to propel your business forward?**

Go ahead, use this space below to jot down some of your MITs.  
This is a brain dump space.



A large, empty rectangular box with a thin grey border, intended for writing down the most important tasks.

## TRAINING 10.1: SYSTEMS ARE SEXY

Alright, great work! Now we're going to prioritize your MITs so it doesn't feel so overwhelming.

Look over your list and put a star next to the three that are your top 3 priorities.

Now think about the rest:

- Do you have an assistant you can delegate to?
- Do these tasks need to be broken down into smaller tasks?

Use the space below to rework your MIT list, this time writing each task in order of importance. Don't forget to delegate and break down large tasks into smaller, more manageable MITs.

Ranked  
MITs

**Reminder:** Take some time to set up that Google Calendar. You don't need to plan your entire life, but do schedule work time including start and stop times. This will better help you stay on task and get you MITs done.

### ► *Personal Development Exercise: The Time Audit*

Make it a priority this week to do a time audit.

You'll track your daily activities (social media scrolls, work, breaks, texts, phone calls, etc.). At the end of the week, go back and see how much of that time was productive and how much of that time was filled with time leaks.

Once you've done the audit, you can then better prioritize your time and put effective systems in place. It's the small simple steps you take that you can systemize that will help you so much.

We have two options for you to complete the time audit. You can print out the next page and draw in blocks of time for your schedule, or you can use this [Google Sheet Template](#) to complete your time audit digitally.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
5:00							
6:00							
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							
7:00							
8:00							
9:00							



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# How to Automate Your Client Scheduling

Automation is going to make your life easier and help you stay on task! It's like having a clone of yourself doing all the boring repetitive tasks.

## ► *Automating Client Scheduling*

A software for scheduling is a must. Make sure you're using Google Calendar as your master calendar. In addition to Google Calendar, you will need scheduling software for your client calls as well.

Your first step is to pick software to start automating your tasks.

### SCHEDULING SOFTWARE:

- [Calendly](#) (I use this one!)
- [Acuity](#)
- [SimplyBook](#)

All the systems are very similar. You can't choose the wrong one. The only bad decision is not to use one.

Which one will you use? \_\_\_\_\_

## ► *Automating Payments*

Once you've automated your calendars, the next step is automating payments so you don't have to chase payments.

When you have your payments and appointments automated, you look like you know what you're doing. Clients want to work with coaches who are put together and have systems in place.

Automated payments allow you to create subscriptions for your clients, which is great since they'll likely be on board with you for 3-6 months minimum. I recommend the following for automating payments:

- [PayPal](#)
- [Stripe](#)

Take some time to research PayPal and Stripe and pick one for your payment automation.

Which will you use? \_\_\_\_\_

## TRAINING 10.2: AUTOMATE YOUR CLIENT SCHEDULING

Once you've chosen this, set up automatic payments. Schedule a time in your calendar when you will set up all of your clients on automatic payments.

Afterwards, you can go into your calendar and set reminders to end payments on the end date for each of your clients. **It's very important that you do this so that your clients aren't billed after their last session.**

This is just another example of why it's crucial to have everything recorded in your Google Calendar. Systems are sexy because systems make your business professional and successful!

### ► *Automating Email*

Typing emails can be a huge waste of time, but copying and pasting drafts leaves too much room for error, so let's automate them using Google Email Templates. Here's a step by step guide to Google Email Templates:

1. Login to your Gmail account.
2. Click on the gear icon in the top right corner and click on "Settings"
3. Select "Advanced" from the tool bar along the top
4. Enable Templates so can create email templates
5. Create a new email. Create the email exactly as you want your template to appear.
  - a. Tip: Do not include your signature in the template if your signature automatically populates when you send an email. You don't want two signatures on your email!
6. Click the 3 dots near the bottom right of the email. Choose "Templates"
7. Click "Save draft as template"
8. Select "Save as new template"
9. Add your template name and click "Save"

You should automate any email you plan to send more than a couple times. Use email templates for potential coaching clients, inquiries about collaborations, answers to frequently asked questions, etc.

► *Time Batching*

Time batching simply means you set aside a block of time to do similar tasks.

You can batch time to set up automation to schedule emails, newsletters, and even social media posts!

A great place to start time batching is with content you need to produce such as social media posts, newsletters, and Pinterest pins. Below, list your content MITs for the next month.



A large, empty rectangular box with a thin grey border, intended for listing content MITs for the next month.

## TRAINING 10.2: AUTOMATE YOUR CLIENT SCHEDULING

Next to each MIT above write how much time you estimate it will take to create all of that specific type of content for the month.

Now, schedule a block to time-batch each of your content MITs. Make it a goal to limit writing social media posts, newsletters, etc. to once a month.

You should time-batch everything that you create.

**Make a list of other things you can time-batch. An example could be podcast episodes, graphics, articles, etc.**

As you use your time to batch content, make sure you're using your email service to schedule emails to auto send on the dates you've chosen. Use your email software to schedule your email, and use Facebook Creator Studio to schedule social media for both Facebook and Instagram.

We live in a time when technology can really work for us. We don't have to spend a ton of money hiring a team in the beginning because we can automate so many tasks that we essentially clone ourselves.

It may take significant time and energy to shift your schedule from completing the day's to-do list to preparing ahead of time for what you know needs to be done. Take the time, do the work, and become an expert and scheduling, automation, and time batching!

Use Google Calendar to keep your time and energy focused. Don't work solely from your to-do list. To-do lists are good for brain dumping, but a schedule keeps you on track long term.

**Go ahead and schedule some time batching in your Google calendar right now before moving on to training 3.**



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# How to Get Stuff Done

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Now that you've set up systems, automation, time-blocking, and your MITs, it's time to actually get things done! Here's an example of how to get a big and overwhelming task done: Let's say you need to create a website for your business, here's how to complete this task...

## ▼ WHAT NEEDS TO BE DONE

A website needs to be created for my business. This includes finding a web designer, setting up systems, and writing copy.

## ▼ HOW IT WILL GET DONE

I need to find a designer, which will require some research. I'll need to make time to meet with them either in person or virtually to map out the website. I'll need to write content for the site, hire a photographer for new headshots, gather testimonials from past or current clients, and set up payment.

## ▼ WHO WILL COMPLETE THE TASK

I've decided I would like to hire a designer to complete my website because I just don't have time to do it myself, so I have to map out time to research a designer a friend recommended. After I choose a designer, they will create the website, and I will provide feedback along the way.

I also need new headshots, so I am going to take some time to research local headshot photographers. They will edit the photos, but I need to get them to the designer for the website.

Also, a friend told me about a service she used to help her create an outline for writing web content that made it more efficient for her, so I'll need to contact her for an appointment to see if this is something I want to use.

## ▼ WHEN TASKS WILL BE COMPLETED

It's the beginning of September now so I think realistically I could plan for a mid or late January launch if I prioritize finding a designer, photographer, and writing content. I'm now going to open my calendar and schedule realistically timed sub-tasks to get this larger task completed.

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Remember when you add things to the calendar, they get done. Make sure you're scheduling research time, writing time, and review time.

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## TRAINING 10.3: HOW TO GET STUFF DONE

As you're thinking through tasks and projects that need to be completed, this template of "what, how, who, and when" is a great place to start. It allows you to do a brain dump and then delegate or prioritize tasks so that you can continue to focus on the larger task at hand. (Another helpful hint is to batch tasks together that require similar resources to make your productivity flow more efficiently!)

Spend some time mapping out a task you need to complete by doing a brain dump below.

**Identify the task:** Write below the task you need to complete. (eg: Build a website)

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**What needs to be done:** Use the space below to identify what needs to be completed. (eg. Book headshot photographer. Make sure you describe each step to complete the task.)

**How will the task get done:** Use the space below to identify how the task will get done. (eg. Who needs to be hired, what content needs to be written, etc.)

## TRAINING 10.3: HOW TO GET STUFF DONE

**Who will complete the task:** Use the space below to identify who will complete each piece of the task. (Eg: Designer, photographer, etc.)

**Date for completion:** Use the space below to identify a realistic deadline and launch date.

**Final step:** Put everything on your Google Calendar and schedule in enough time to complete each step of the task. (This is a good place to use the batching method we previously discussed!)

## ► *Power Punches*

Power punches are 15-minute windows of time that you can schedule smaller tasks to power through. Use the space below to identify five tasks you can knock out in a power punch.

- 1.
- 2.
- 3.
- 4.
- 5.

Don't forget the fun part! Add 15 extra minutes to those power punch times and reward yourself! (But set a timer so you don't allow your reward time to turn into a time leak!)

Lastly, I want to remind you that getting things done is more than sitting in front of a screen: it's also taking care of your mind, body, and soul.

Keep in mind that every successful businesswoman takes time to invest in herself.

Investing in yourself can be anything from scheduling time in the morning to exercise, to doing some soul care, to reading.

You can also invest in a coach or schedule a few professional development days quarterly.

These development days can include conferences (a great way to network), time away from your home office so you can dream about your business and plan out the next few months, or even just spending time doing soul care and refreshing yourself for the next quarter.

**Take a few minutes to make a vision board on the next page of ways that you can invest into yourself as a business owner, coach, and human being.**

# Self-Investment Vision Board

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# Wrap Up

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*Great work finishing up this module! You're one step closer to booking clients and growing your business. Take a moment to reflect on all you learned, and then don't forget to visit the bonuses you unlocked.*

My biggest takeaway from this module is . . .

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The changes I made based on this module that will help my business be successful are . . .

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Some things I learned in this module that I wasn't able to focus on right now but want to come back and work on later are . . .

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