



Coach's CEO Toolkit

Business Calendar

cheri  gregov

What recurring tasks do I
need to handle when?

Tailored calendar of recurring
tasks for your business

Business Agenda

Recurring Activities Calendar

As a CEO, there are activities that require our attention on a regular basis. Follow this calendar for daily, weekly, and monthly tasks.

Daily

New Business

- Check calendar to manage and prepare for meetings (Calendly)
- Check for new form submissions via email notifications (Typeform)
- Check for new web submissions, email notifications or app notifications (GoDaddy)

Contact

- Check for comments and messages to respond to in social media, messaging, and email (Social, Email, Messaging)

Coach

- Coach clients in sessions

Marketing

- Create marketing copy for posts and marketing emails
- New program and offer development

Training

- Personal development to enhance coaching skills

Business Agenda

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Weekly

Financials

- Update Revenue / Expense Tracker with any new revenue collected or payments made from the week.
- Check business credit card for expenses.
- Check business bank account for payments received and made.
- Check Stripe for new payments received.

Business Administration

- Clean email inbox.
- Organize client and business notes and files, both paper and electronic.

Contact

- Update Contact Tracker with latest contacts made
- Review Tracker for those who you haven't connected with recently to nurture all clients and contacts.

Marketing

- Send weekly email to marketing list, repurposing social media content that drew the most engagement or new content.
- Batch record or write social media posts for the week.

Monthly

Business Management

- Update Business Metrics and view trend and health of business to guide goals for next month