Template: Daily Productivity Planner

A structured daily planner to organise business priorities



Introduction

Many entrepreneurs stay busy the whole day, but still do not see business growth.
This usually happens because time goes into small tasks, arranging, checking messages, planning, instead of activities that generate customers and revenue.

This planner helps entrepreneurs organise their day around **business priorities, not just work.**

By using it daily, an entrepreneur can:

- Focus on revenue-generating activities
- Track customers and follow-ups properly
- Control expenses and cash flow
- Build a consistent work routine
- Make steady business progress every day

Simple Rule:

Every day should bring either a customer, a sale, or an improvement in the product/service.

How to Use This Planner

Step 1 → Morning Planning (5–10 minutes)

Start the day by filling:

1. Revenue target
2. Top 3 money-making tasks
3. Important support tasks

These should guide the entire day.

Step 2 → Work in Priority Order

Complete work in this sequence:

1. Sales and customer contact
2. Follow-ups and quotations
3. Product/service delivery
4. Marketing activity
5. Other tasks

Never start the day with small admin work.

Step 3 → Update During the Day

After each customer interaction:

1. Record details in the customer tracker
2. Note the payment or pending amount
3. Add follow-up date if required

This prevents lost customers and missed payments.

Step 4 → Track Cash Daily

At the end of the day:

1. Record money received
2. Record expenses
3. Calculate closing cash

Daily tracking prevents financial confusion and business losses.

Step 5 → Night Review (5 minutes)

Before closing work:

1. Check if top tasks were completed
2. Write what worked and what wasted time
3. Decide on tomorrow's first task

Planning tomorrow today improves discipline and productivity.

Daily Productivity Planner [Template]

Date: _____

Focus of the Day (One Line Goal):_____

Today's Main Business Driver: ☐ Sales ☐ Marketing ☐ Delivery ☐ Product ☐ Finance ☐ Hiring

Top 3 Priorities (Must Be Completed Today)

Daily Targets:

Leads _____ Sales _____ Orders _____ Collections ₹_____

Time Block Plan (IST)

Time	Planned Work	Completed (✓)
07:30 – 08:00	Personal preparation / planning	
08:00 – 09:00	Emails & customer responses	
09:00 – 11:00	Deep work (revenue task)	
11:00 – 13:00	Calls / meetings / vendors	
13:00 – 14:00	Lunch / break	
14:00 – 16:00	Operations / marketing	
16:00 – 17:30	Follow-ups / closures	
17:30 – 18:00	Planning tomorrow	

Daily Business Control Check

☐ Cashflow checked / invoices sent
☐ Customer follow-ups completed
☐ Marketing activity done
☐ Team coordination done
☐ Orders updated

☐ Expenses recorded

Notes / Issues / Ideas

End of Day Review

What moved the business forward today?

Biggest obstacle faced:

Improvement for tomorrow:

Tomorrow’s First Task:

Rule: Plan tomorrow before closing today.

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