



Checklist 4 - Staying Organized

Project Name: _____

Date: _____

- | | | <i>Yes</i> | <i>No</i> |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 1 | Use some kind Customer Relationship Management tool (CRM). Go get a free or a paid one, but get one. Keep track of any interactions with customers with this as well as updating any new information with this (emails, phone numbers, people, payment information). | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Team members will need access to certain things in order for you to complete a project. Make sure and keep track of any login information or any other “need to know” project info and make it easy to share with your team. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Stay organized with your daily tasks by having a way to make quick checklists. DO NOT overload yourself with a ton of tasks. Add your biggest task/priority and finish that FIRST. I recommend you don't add anything else until it's done. If you have to, think of 1-3 things that you absolutely have to get done that day and ONLY focus on completing those before moving on to anything else. | <input type="checkbox"/> | <input type="checkbox"/> |

CRM

Free: <https://www.hubspot.com/products/crm>

Paid: <https://www.pipedrive.com/>

Trello

<https://trello.com/>

Google To-Do Sheets

<http://sheets.google.com/>

Notes