STEP #1

GET STARTED!

On the notes page, take note of what actions need to be taken to begin working on the project. Recurring actions should be available in your standard operating procedures. If you need help completing or setting up visual SOPs or team training libraries or documents for smoother workflows *view explainer video #1*

Brand/ Client:

_____

Project Name:

_____

STEP #2

SEPERATE & DELEGATE TASK

*Delegate tasks to your virtual assistant, contractors, team members, etc. in the appropriate space below by filling in their name or title and responsibilities in the **separate and delegate section** below. If you don't have anyone yet, write the desired department name at the top and fill in what their tasks would be so you can begin to build the habit. If you need help in this area view the explainer video #2*

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Start Here

Complete steps 1-4 to kickstart project prep and stay on track with your deadlines. If you need extra help, click to gain access the explainer videos for best practices for completing each step.

CLICK HERE TO GAIN ACCESS NOW

Workflow
PROJECT TRACKER

STEP #3

TRACK YOUR PROGRESS

*Add overall project notes and additional notes on the next page. use the **Clearview Check-In Tracker** to fill in the dates that you check in, review, or come to a pause as you go throughout the project lifecycle so you can stay on track with your deadlines, your next action steps and easily pick up where you left off. If you need help in this area view explainer video #1*

STEP #4

AUTOMATED WORKFLOWS

Brainstorm and think of the repetitive actions that you normally take on during the majority of your projects. Have you considered automating these tasks for smoother project flows as you continue to grow? If you need help deciding what actions need to be automated or need help setting up automations for project flow view explainer video #3 for best practices.

Seperate & Delegate Task

TASK 3	TASK 2	TASK 3	TASK 4
ASSIGN TO	ASSIGN TO	ASSIGN TO	ASSIGN TO
TASK DETAILS	TASK DETAILS	TASKS DETAILS	TASK DETAILS

Scope Of Work:

Take notes on the overall project details, plans of action & important deadlines

CLEARVIEW CHECK-IN TRACKER

Take note of your progress, important reminders, any issues that may slow you down, and things that need to be improved throughout the project's lifecycle.

WORKFLOW NOTES

Check-In Date 1 : _____

WORKFLOW NOTES

Check-In Date 2 : _____

WORKFLOW NOTES

Check-In Date 3 : _____