TRIGGER'S LIST

To find other triggers in your business:

- Go through your project manager system and see if you are missing anything in the current projects
- Go through your bank account and see if anything needs to be removed or dealt with

Communications

☐ Email

☐ Voicemail

☐ Facebook Messenger

☐ Mail

☐ Thank you cards

Clients/Customers

☐ Follow up

☐ Proposals

☐ Checking in

☐ Introductions

Employees

☐ Systems to create

☐ Quarterly evaluations

☐ Hiring

☐ Job descriptions

Finances

☐ Cashflow

☐ Credit line

- [ ] Bookkeeper/CPA
- [ ] Estimated Taxes
- [ ] Legal structure - LLC or C corp etc
- [ ] Budget
- [ ] Payables/Receivables

Environment Triggers

- [ ] Paperwork
- [ ] Messy desk
- [ ] Messy desktop
- [ ] Dropbox / Google Drive a mess
- [ ] Office equipment – computers printers backups
- [ ] Whiteboards

Upcoming Events

- [ ] Networking/conferences to prep for
- [ ] Travel
- [ ] Presentations
- [ ] Meetings
- [ ] Insurance renewal

Projects

- [ ] Unfinished projects
- [ ] Proposals
- [ ] Marketing Ideas
- [ ] Metrics and analytics