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Your 5-Day Planning Jumpstart Guide Created by Mike Sweeney, CPSM

Are you thinking about updating your website, cleaning up your contact list, upgrading your marketing software, or developing better methods for tracking leads and sales?

Of course you are! So it's time to make these priorities for 2021.

Start by discovering what's in the way – or what's missing. What are the first necessary steps you can take to make it happen? The very first step is probably deceptively easy. Unfortunately, you probably can't do it right now, and it might take you longer than five minutes. Or it might someone else a day or two to provide the necessary information. It's usually the later steps that are more difficult. These are where the whole effort can stall out.

We've designed a program to help you get past those hurdles!

Overview

This program is designed to help you set yourself up to make major progress. You can spend just ten minutes each day over the next five days on the exercises in this guide, you will have a resource you can look back on later.

Also, we'll be leading a daily ten-minute stand-up meeting via Zoom. Recordings will be available for review later for all who are on the list. This allows you to complete the daily worksheet for each of your goals with support from your peers.

You can access a version of this in Microsoft Word and Adobe PDF. You can fill in the template on your computer, or you can print it out. Make sure when you print it out to print one page per sheet (single-sided). This way, you can split these off and put each page in a separate project folder, if desired.

You may need some paper supplies, including file folders, sticky notes, and notepads.

Day 1: Select Your Goals

Date: ____ / ____ / ____

Here are some top to-do list chestnuts. Choose from these lists, or substitute your own.

Design Storytelling	Marketing Systems	Project Management
• Turn ideas into finished pieces • Publicize/promote recent achievements	• Update your website • Clean up your contact list • Evaluate newer CRM software and • Develop better methods for tracking leads and sales	• Focus your efforts on your best customers and prospects • Get more work from your existing clients • Deepen relationships with one-time customers to obtain repeat business

Using the lists in the previous section, select four goals, one for each day of the week. Write them out here:

	GOAL	COMPLETE BY
A	Goal: Why:	____ / ____
B	Goal: Why:	____ / ____
C	Goal: Why:	____ / ____
D	Goal: Why:	____ / ____
GROUP COMPLETION DATE (unless otherwise noted)		____ / ____

Day 2: Goal A: _____

In ten minutes, write in five concrete actions you need to take to accomplish this goal.
Answer the question in each of the four columns for each step you wrote in.

Date: ____ / ____ / ____		Why:		
FIRST STEPS	1. HOW LONG WILL IT TAKE?	2. LEVEL OF DIFFICULTY (1 = LOW 5 = HIGH)	3. ADD'L PEOPLE OR SKILLS NEEDED?	4. BY WHEN SHOULD IT BE DONE?*
•				__ / __
•				__ / __
•				__ / __
•				__ / __
•				__ / __

*On or before 2/14

Reflections

Write down any thoughts and emotions about the task(s) you have just outlined

SERVICE SPOTLIGHT

Design Storytelling provides specialized copywriting and editorial expertise for marketing materials used A/E/C industry professionals. These can include printed materials (brochures, proposals, qualifications packages, résumés, project slip sheets, design portfolios, publishable journal articles), and digital content (email campaigns, blog posts, and website-based content).

Customers: individual design professionals (architects, engineers, interior designers, landscape architects urban planners, etc.). Sole practitioners, business owners, principals, firm leaders, marketing professionals, support staff.

Learn more at: <http://designproductsystems.com/services/design-storytelling/>

Day 3: Goal B: _____

In ten minutes, write in five concrete actions you need to take to accomplish this goal.
Answer the question in each of the four columns for each step you wrote in.

Date: ____ / ____ / ____		Why:		
FIRST STEPS	1. HOW LONG WILL IT TAKE?	2. LEVEL OF DIFFICULTY (1 = LOW 5 = HIGH)	3. ADD'L PEOPLE OR SKILLS NEEDED?	4. BY WHEN SHOULD IT BE DONE?*
•				__ / __
•				__ / __
•				__ / __
•				__ / __
•				__ / __

*On or before 2/14

Reflections

Write down any thoughts and emotions about the task(s) you have just outlined

SERVICE SPOTLIGHT

Marketing Systems helps firms streamline and balance in-house marketing activities with marketing-focused technical analysis, solution implementation, and problem-solving. Projects have included data cleaning and migration, application integration, workflow automation, pre/post-implementation consulting, and needs analysis.

Customers: individual design professionals (architects, engineers, interior designers, landscape architects urban planners, etc.). Sole practitioners, business owners, principals, firm leaders, marketing and IT professionals, operations and support staff.

Learn more at: <http://designproductsystems.com/services/marketing-systems/>

Day 4: Goal C: _____

In ten minutes, write in five concrete actions you need to take to accomplish this goal.
Answer the question in each of the four columns for each step you wrote in.

Date: ____ / ____ / ____		Why:		
FIRST STEPS	1. HOW LONG WILL IT TAKE?	2. LEVEL OF DIFFICULTY (1 = LOW 5 = HIGH)	3. ADD'L PEOPLE OR SKILLS NEEDED?	4. BY WHEN SHOULD IT BE DONE?*
•				__ / __
•				__ / __
•				__ / __
•				__ / __
•				__ / __

*On or before 2/14

Reflections

Write down any thoughts and emotions about the task(s) you have just outlined

SERVICE SPOTLIGHT

Project Management provides support to ensure that firms execute their larger marketing initiatives without compromising clear messaging. We augment the efforts of principals and in-house marketing personnel to bring larger marketing initiatives within reach. We maintain the consistency and good health of your marketing operations during business transitions.

Customers: individual design professionals (architects, engineers, interior designers, landscape architects urban planners, etc.). Sole practitioners, business owners, principals, firm leaders, marketing and IT professionals, operations and support staff.

Learn more at: <http://designproductsystems.com/services/project-management/>

Day 5: Goal D: _____

In ten minutes, write in five concrete actions you need to take to accomplish this goal.
Answer the question in each of the four columns for each step you wrote in.

Date: ____ / ____ / ____		Why:		
FIRST STEPS	1. HOW LONG WILL IT TAKE?	2. LEVEL OF DIFFICULTY (1 = LOW 5 = HIGH)	3. ADD'L PEOPLE OR SKILLS NEEDED?	4. BY WHEN SHOULD IT BE DONE?*
•				__ / __
•				__ / __
•				__ / __
•				__ / __
•				__ / __

*On or before 2/14

Reflections

Write down any thoughts and emotions about the task(s) you have just outlined

SERVICE SPOTLIGHT

Infographic Design & Data Visualization helps firms promote previous accomplishments, and advance proposed projects. We craft data-rich depictions of complex and long-running projects for all types of presentation formats, audiences, and industries. We can help you communicate the most important information about your project at any point in its progress.

Customers: individual design professionals (architects, engineers, interior designers, landscape architects urban planners, etc.). Sole practitioners, business owners, principals, firm leaders, marketing and IT professionals, operations and support staff.

Learn more at: <http://designproductsystems.com/services/infographic-design/>

Goal (circle one) A B C D : _____ **(cont'd)**

Print additional copies of this page as needed, and add to your project file.

Answer the question in each of the four columns for each step you wrote in.

Date: ____ / ____ / ____

FIRST STEPS	1. HOW LONG WILL IT TAKE?	2. LEVEL OF DIFFICULTY (1 = LOW 5 = HIGH)	3. ADD'L PEOPLE OR SKILLS NEEDED?	4. BY WHEN SHOULD IT BE DONE?*
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About Design-product Systems

Design-product Systems serves Greater Boston's architecture, engineering, and construction (AEC) and creative industries. Our unique service mix helps creative individuals and firms clarify marketing messages, and simplify marketing and business development efforts.

When you balance clarity and efficiency, you get more of both.

Learn more at: <http://DesignProductSystems.com>.

Find help on marketing initiatives.

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