

Time Management & Productivity Checklist for Business Owners

A Practical Guide by Steven Rouget, ActionCOACH Business Coach

Introduction

As a business owner, your time is your most valuable asset. This checklist provides actionable strategies to help you maximize productivity, eliminate time-wasters, and create more freedom in your business and personal life.

After 23 years of coaching business owners, I've identified the most effective time management strategies that actually work in the real world of running a business.

Section 1: Time Audit & Assessment

☐ Complete a Time Audit

Track how you spend your time for one full week: - Use 15-minute intervals - Record everything: meetings, calls, emails, interruptions - Note energy levels (high, medium, low) for each activity - Identify patterns and time-wasters

☐ Calculate Your Hourly Value

- Determine your desired annual income
- Divide by 2,000 (50 weeks × 40 hours)
- This is your target hourly value
- Use this to evaluate if tasks are worth your time

☐ Identify Your Peak Performance Hours

- When are you most focused and energetic?
 - When do you do your best creative work?
 - When are you most effective at making decisions?
 - Schedule high-value activities during these times
-

Section 2: Priority Management

☐ Use the Eisenhower Matrix

Categorize all tasks into four quadrants: - **Quadrant 1:** Urgent & Important (Do First) - **Quadrant 2:** Important but Not Urgent (Schedule) - **Quadrant 3:** Urgent but Not Important (Delegate) - **Quadrant 4:** Neither Urgent nor Important (Eliminate)

☐ Apply the 80/20 Rule (Pareto Principle)

- Identify the 20% of activities that generate 80% of your results
- Focus more time on high-impact activities
- Minimize or eliminate low-impact tasks

☐ Create a "Stop Doing" List

List activities you will stop doing: - Tasks that don't align with your goals - Activities others can do better or cheaper - Time-wasting habits and distractions

Section 3: Planning & Organization

☐ Implement Weekly Planning Sessions

Every Sunday or Friday: - Review the previous week's accomplishments - Plan the upcoming week's priorities - Schedule important tasks in your calendar - Prepare for upcoming meetings and deadlines

☐ **Use Daily Planning (The Night Before)**

Each evening: - Review tomorrow's schedule - Identify the top 3 priorities for the day - Prepare materials needed for meetings - Set intentions for the day

☐ **Time Block Your Calendar**

- Block time for different types of work
- Include buffer time between meetings
- Schedule breaks and lunch
- Protect time for strategic thinking

☐ **Create Standard Operating Procedures (SOPs)**

Document processes for: - Recurring tasks and procedures - Client onboarding and service delivery - Administrative tasks - Emergency procedures

Section 4: Delegation & Team Development

☐ **Identify Tasks to Delegate**

Tasks that should be delegated: - Routine administrative work - Tasks others can do 80% as well as you - Activities outside your zone of genius - Time-consuming but low-skill tasks

☐ **Develop Your Team's Skills**

- Provide training for delegated tasks
- Create clear job descriptions and expectations
- Establish regular check-ins and feedback sessions
- Invest in your team's professional development

☐ **Implement Accountability Systems**

- Set clear deadlines and expectations

- Use project management tools
 - Schedule regular progress reviews
 - Celebrate completed tasks and achievements
-

Section 5: Communication Efficiency

☐ Optimize Email Management

- Check email at designated times only (2-3 times per day)
- Use the 2-minute rule: if it takes less than 2 minutes, do it now
- Create email templates for common responses
- Unsubscribe from unnecessary mailing lists

☐ Improve Meeting Efficiency

- Always have an agenda
- Set time limits and stick to them
- Invite only necessary participants
- End with clear action items and deadlines

☐ Establish Communication Boundaries

- Set specific office hours
 - Use "Do Not Disturb" signals
 - Train staff when to interrupt and when to wait
 - Create emergency vs. non-emergency protocols
-

Section 6: Technology & Tools

☐ Use Productivity Apps and Tools

Recommended tools: - **Calendar:** Google Calendar or Outlook - **Task Management:** Asana, Trello, or Monday.com - **Note-Taking:** Evernote or Notion - **Time Tracking:** RescueTime or Toggl

☐ Automate Repetitive Tasks

Areas for automation: - Email responses and follow-ups - Appointment scheduling - Invoice generation and payment reminders - Social media posting

☐ Organize Digital Files

- Create a logical folder structure
- Use consistent naming conventions
- Regularly clean up and archive old files
- Backup important documents

Section 7: Energy Management

☐ Optimize Your Physical Environment

- Ensure good lighting and comfortable temperature
- Minimize noise and distractions
- Keep workspace clean and organized
- Have necessary supplies readily available

☐ Manage Your Energy Levels

- Take regular breaks (every 90 minutes)
- Stay hydrated and eat healthy snacks

- Get adequate sleep (7-8 hours per night)
- Exercise regularly to maintain energy

☐ **Practice Stress Management**

- Learn to say "no" to non-essential requests
 - Practice deep breathing or meditation
 - Take time for activities you enjoy
 - Maintain work-life balance
-

Section 8: Continuous Improvement

☐ **Regular Review and Adjustment**

Monthly review: - What time management strategies are working? - What challenges are you still facing? - What adjustments need to be made? - What new strategies should you try?

☐ **Seek Feedback**

- Ask your team about workflow efficiency
- Get input on communication effectiveness
- Request suggestions for improvement
- Be open to changing your approach

☐ **Invest in Learning**

- Read books on productivity and time management
 - Attend workshops or seminars
 - Learn from other successful business owners
 - Consider working with a business coach
-

Quick Daily Checklist

Morning Routine (10 minutes)

- ☐ Review today's priorities
- ☐ Check calendar for appointments
- ☐ Identify potential obstacles
- ☐ Set intention for the day

Throughout the Day

- ☐ Focus on one task at a time
- ☐ Take breaks every 90 minutes
- ☐ Handle interruptions efficiently
- ☐ Stay hydrated and energized

Evening Routine (10 minutes)

- ☐ Review what was accomplished
 - ☐ Plan tomorrow's top 3 priorities
 - ☐ Clear desk and organize workspace
 - ☐ Celebrate the day's wins
-

Weekly Productivity Habits

- ☐ **Monday: Plan the week and set priorities**
 - ☐ **Tuesday: Focus on high-impact activities**
 - ☐ **Wednesday: Review progress and adjust plans**
 - ☐ **Thursday: Handle administrative tasks**
 - ☐ **Friday: Complete projects and plan next week**
-

Common Time Management Mistakes to Avoid

- ☐ **Avoid These Productivity Killers:**
 - Checking email constantly throughout the day
 - Attending meetings without clear agendas
 - Multitasking (it reduces efficiency by 40%)
 - Not delegating tasks that others can handle
 - Perfectionism on low-priority tasks
 - Not taking breaks (leads to burnout)
 - Saying "yes" to every request
 - Not having systems and processes in place
-

Emergency Time Management Protocol

When you're overwhelmed:

1. ☐ **Stop and breathe** (2 minutes)

2. ☐ **List everything** that needs to be done
 3. ☐ **Prioritize using** the Eisenhower Matrix
 4. ☐ **Delegate** what you can immediately
 5. ☐ **Focus on** the most important task first
 6. ☐ **Ask for help** if needed
 7. ☐ **Reschedule** non-essential activities
-

Measuring Your Progress

Weekly Metrics to Track:

- ☐ Hours spent on high-value activities
- ☐ Number of tasks delegated
- ☐ Time saved through automation
- ☐ Stress levels (1-10 scale)
- ☐ Work-life balance satisfaction

Monthly Goals:

- ☐ Increase high-value activity time by 20%
 - ☐ Reduce email checking to 3 times per day
 - ☐ Delegate 5 new tasks to team members
 - ☐ Implement 2 new productivity systems
 - ☐ Improve work-life balance score
-

Resources for Further Learning

Recommended Books:

- "Getting Things Done" by David Allen

- "The 7 Habits of Highly Effective People" by Stephen Covey
- "Deep Work" by Cal Newport
- "The One Thing" by Gary Keller

Productivity Apps:

- Todoist (task management)
 - Forest (focus and concentration)
 - Freedom (website/app blocking)
 - Calendly (appointment scheduling)
-

Conclusion

Effective time management isn't about doing more things—it's about doing the right things efficiently. Start by implementing 2-3 strategies from this checklist, master them, then gradually add more.

Remember: Time management is really energy management. Focus on your highest-value activities when your energy is at its peak, and delegate or eliminate everything else.

The goal is to create a business that runs without your constant involvement, giving you the freedom to focus on growth and enjoy your life.

Need Help Implementing These Strategies?

Join Project BETA for ongoing support and accountability, or book a free consultation to discuss your specific time management challenges.

Contact Steven Rouget: - Email: steven@actioncoach.com - Phone: [Your Phone Number] - Website: www.stevenrouget.com.au

This checklist is part of the ActionCOACH methodology for business growth and efficiency. For more resources, visit our website.

© 2025 Steven Rouget ActionCOACH. All rights reserved.