

# The Executive Director Planner Tool

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Promotion and Image Development*

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*NMMS Revitalization Specialist in  
Graphic Design & Marketing*



**NEW MEXICO  
MAINSTREET™**  
*Promotion*







Plan your work.



Work your plan.



Nothing makes me  
more productive than  
the last minute.





MainStreet  
Executive  
Directors  
juggle a LOT!

(and the struggle is **REAL**)



# IDEA:

is there a way  
to keep it "all"  
in one place?





# January - March

Started with a rough draft of content

# April - June

Design

# July - December

Working Draft





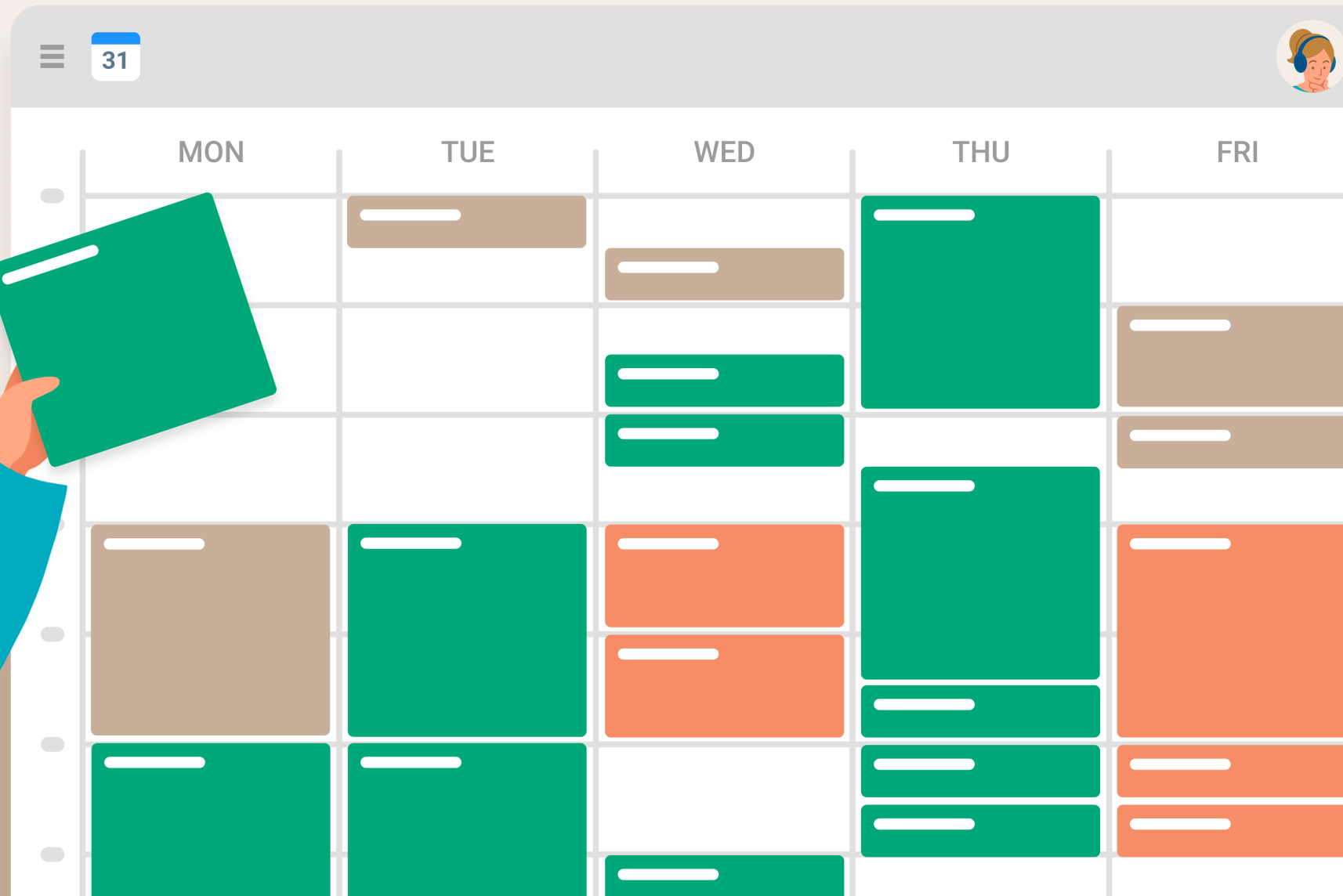


One hour of planning can  
save you 10 hours of doing.

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# Timeblocking 101



Doesn't have to be complicated

Start with one or two "chunks"



**Manage your  
work...**

HELP

**Don't let your  
work manage you!**

up next: Julia

- Future Log/Year at a glance
- Quarterly Focuses (ETS, Priorities, Personal)
- Ideal Work Day & Daily Routines
- Monthly Calendar
- Monthly Dashboard
- Meetings (Executive, Board, Other)
- Weekly/Daily Planning Pages
- Annual Tasks Worksheets

Service Request Tracker

Grant Tracker

Project/Activity Worksheet

Event Worksheet

Presentation Tracker

Presentation Worksheet

Site Visit/Annual Report Tracker

Testimonials Tracker

Acronym Glossary



# Planner Sections



# Future Log · Year at a Glance

## Future Log | 2022

### JANUARY

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

10 NMMS Quarterly Report

### FEBRUARY

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

25 Financials to Accountant

### MARCH

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

### APRIL

S	M	T	W	T	F	S
						1 2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

15 NMMS Quarterly Report

### MAY

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

15 Taxes Due

### JUNE

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

### JULY

S	M	T	W	T	F	S
						1 2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

15 NMMS Quarterly Report

### AUGUST

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

14-16 NMMS Summer Institute - Ruidoso

### SEPTEMBER

S	M	T	W	T	F	S
						1 2 3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

### OCTOBER

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

15 NMMS Quarterly Report

### NOVEMBER

S	M	T	W	T	F	S
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

15 NM Secretary of State Registration Filing Deadline

15 IRS Form 990 Filing Deadline

### DECEMBER

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

31 NM Attorney General Filing Deadline

- Zoomed out view
- Record things that aren't happening in the current month.

# Quarterly Focus

**ECONOMIC TRANSFORMATION STRATEGIES · PRIORITIES · FOCUS**

**PERSONAL DEVELOPMENT**  
Books · Classes · Meetings for Personal Growth

**QUARTER 1**

**QUARTER 2**

**QUARTER 1**

**QUARTER 2**

**QUARTER 3**

**QUARTER 4**

**QUARTER 3**

**QUARTER 4**



DAILY ROUTINES

PERSONAL MORNING ROUTINE	TIME ALLOTTED
hydrate @ wakenp	
treadmill / stretch	20 min
shower, teeth, dress	30 min
breakfast, watch news, check social media	30 min
clean one thing on cleaning list	15 min

WORK START-UP ROUTINE	TIME ALLOTTED
light relaxation candle	
check emails, messages - update TO-DO list	15 min
check mail	
Review TO-DO Lists, make modifications	10 min

PERSONAL MID-DAY ROUTINE
lunch
Stretch / Meditation

WORK SHUT-DOWN ROUTINE
phone on silent
review today's calendar, add
migrate incomplete tasks to to
log today's win

PERSONAL EVENING ROUTINE
dinner
dishes / counters / clutter p
wash face, moisturize, tee
stretch
read

IDEAL WORK DAY/WEEK WORKSHEET

Maximize Productivity

5am \_\_\_\_\_  
 6am *Morning routine*  
 7am \_\_\_\_\_  
 8am *in office, work start-up routine*  
 9am *open office, turn off answering machine*  
 10am \_\_\_\_\_  
 11am \_\_\_\_\_  
 NOON *lunch*  
 1pm \_\_\_\_\_  
 2pm \_\_\_\_\_  
 3pm *close office, answering machine on*  
 4pm \_\_\_\_\_  
 5pm *work shut-down routine*  
 6pm *dinner*  
 7pm \_\_\_\_\_  
 8pm *evening routine*  
 9pm \_\_\_\_\_  
 10pm *sleep*

- office Hours: 8am-5pm  
 • Open to the public: 9am-3pm

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
MORNING		<i>no meetings</i>		<i>no meetings</i>	
AFTERNOON				<i>Catch-up/ pre-plan for next week</i>	<i>Review, log success/challenges - list for next week</i>
EVENING				<i>Book Club</i>	

# Ideal Work Days & Daily Routines

- Things That Repeat
- Boundaries
- Personal Care Routines

# Monthly Calendars

# 10

OCTOBER 2022

*“Your victory is right around the corner. Never give up.”*

— NICKI MINAJ

- Migrate from Future Log
- Daily Habits
- Monthly Priorities
- Quarterly/Annual Tasks

Sunday	Monday	Tuesday	Wednesday
2	3	4	5
9	10	11	12
16	17	18	19
23	24	25	26
30	31		

Thursday	Friday	Saturday
		1
6	7	8
13	14	15
20	21	22
27	28	29

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VOLUNTEER HOURS

PRIORITIES THIS MONTH:

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QUARTERLY/ANNUAL TASKS:

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DAILY HABITS

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① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩ ⑪ ⑫ ⑬ ⑭ ⑮ ⑯ ⑰ ⑱ ⑲ ⑳ ㉑ ㉒ ㉓ ㉔ ㉕ ㉖ ㉗ ㉘ ㉙ ㉚ ㉛

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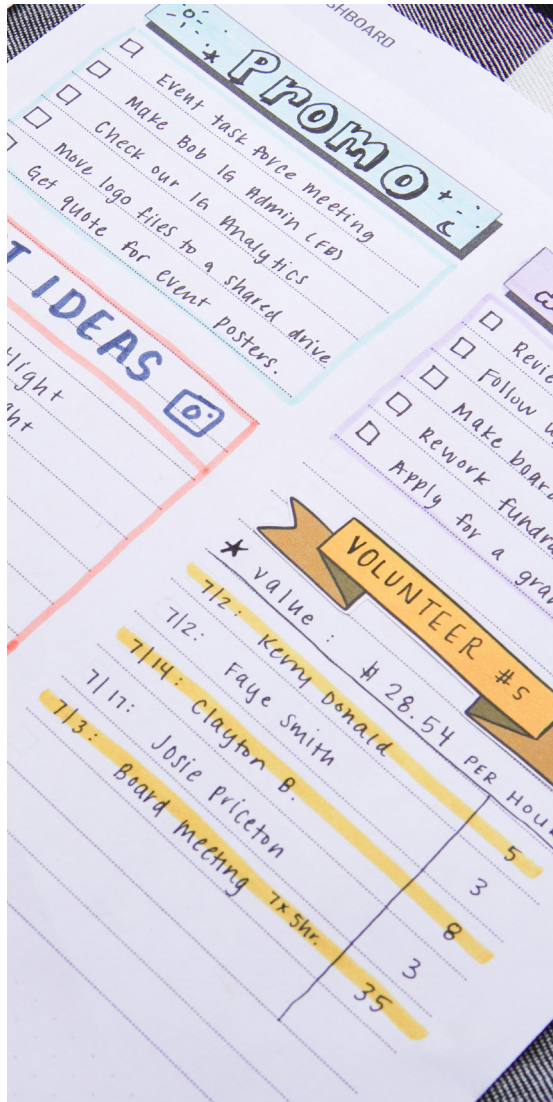
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# Monthly Dashboard Ideas



4 Points Tasks

Weekly Reminders

Social Media Post Ideas

Volunteer Tracker

Potential Volunteers

Potential Donors

Expense Tracker

Income Tracker

Business Visits

District Opportunities

New Idea Tracker

"Brain Dump"

Personal Tasks

Children Tracker

Home Chores

Specific Activity Tasks

Memory Keeping

Roundtable Notes

Yearly Focus Progress

Media Tracker











But where  
is all the  
color?

up next: Connie





- How I use my planner
  - Favorite Features
  - Master the morning start up routine!
- 

*“Most of us spend too much time on what is urgent, and not enough time on what is important.”*

— Steven Covey, *7 Habits of Highly Effective people*



# Making it fun

(items from Dollar Tree - washi tape, stickers, colored pens)

# Ordered online from printme1.com



### GRANT TRACKER

GRANT NAME/GRANTOR: Federal Home Loan Bank

PROJECT: Tucumcari Forge

APPLICATION DUE: June 30<sup>th</sup> NOTIFICATION OF AWARD DATE: \_\_\_\_\_

#### KEY DEADLINES:

DATE:	ITEM DUE:	ADDED TO MASTER TRACKER?
DATE: <u>Sept 1, 2023</u>	ITEM DUE: <u>grant report due</u>	<input type="checkbox"/>
DATE: _____	ITEM DUE: _____	<input type="checkbox"/>
DATE: _____	ITEM DUE: _____	<input type="checkbox"/>
DATE: _____	ITEM DUE: _____	<input type="checkbox"/>
DATE: _____	ITEM DUE: _____	<input type="checkbox"/>

NOTES: grant match of \$4,000 received from TFS&L



### EXECUTIVE MEETING

MEETING DATE: 9 / 13 / 2022 MEETING TIME: Noon

BEFORE THE MEETING:

- email exe. committee
- agenda prep

FOLLOW-UP/TASKS:

- 
- 
- 

up next: Elizabeth



WEEKLY PLANNING

09 SEPTEMBER 2022

MONDAY 5

Start Up Routine

7am	
7:30	
8	
8:30	
9	
9:30	
10	
10:30	
11	
11:30	
12:00	
12:30	
1	
1:30	
2	
2:30	
3	
3:30	
4	
4:30	
5	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	
9pm	

Shut Down Routine

CALLS

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EMAILS

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TUESDAY 6

Start Up Routine

7am	
7:30	
8	
8:30	
9	
9:30	
10	
10:30	
11	
11:30	
12:00	
12:30	
1	
1:30	
2	
2:30	
3	
3:30	
4	
4:30	
5	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	
9pm	

Shut Down Routine

CALLS

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EMAILS

*TV to understand*  
*Design committee*

WEDNESDAY 7

Start Up Routine

7am	
7:30	
8	
8:30	
9	
9:30	
10	
10:30	
11	
11:30	
12:00	
12:30	
1	
1:30	
2	
2:30	
3	
3:30	
4	
4:30	
5	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	
9pm	

Shut Down Routine

CALLS

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EMAILS

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THURSDAY 8

Start Up Routine

7am	
7:30	
8	
8:30	
9	
9:30	
10	
10:30	
11	
11:30	
12:00	
12:30	
1	
1:30	
2	
2:30	
3	
3:30	
4	
4:30	
5	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	
9pm	

Shut Down Routine

CALLS

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EMAILS

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FRIDAY 9

Start Up Routine

7am	
7:30	
8	
8:30	
9	
9:30	
10	
10:30	
11	
11:30	
12:00	
12:30	
1	
1:30	
2	
2:30	
3	
3:30	
4	
4:30	
5	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	
9pm	

Shut Down Routine

CALLS

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EMAILS

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WEEKEND 10-11

7am	
7:30	
8	
8:30	
9	
9:30	
10	
10:30	
11	
11:30	
12:00	
12:30	
1	
1:30	
2	
2:30	
3	
3:30	
4	
4:30	
5	
5:30	
6	
6:30	
7	
7:30	
8	
8:30	
9pm	

NEXT WEEK

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*Labor Day*

*Block: NMMS Reporting*

*LC Board Mtg*

*Event Planners Mtg (Chamber)*

*no work*



EXECUTIVE MEETING

BOARD MEETING

09 | SEPTEMBER 2022

MEETING DATE: / / MEETING TIME:

MEETING DATE: 9 / 20 / 22 MEETING TIME: 6:15pm

BEFORE THE MEETING:

FOLLOW-UP/TASKS:

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BEFORE THE MEETING:

FOLLOW-UP/TASKS:

- Financials
- Agenda
- Email mtg min
- 25+<sup>th</sup> Anniv. gifts
- 

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- 
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MEETING NOTES:

Grid area for meeting notes.

MEETING NOTES:

Grid area for meeting notes.

NEXT MEETING DATE: / / MEETING TIME:

NEXT MEETING DATE: / / MEETING TIME:



up next: Julia



# Adding Personality :)

- Try Monthly Themes
- Stickers
- Color-coding
- Washi Tapes
- Photos
- Printables

# 07

JULY 2022

*The expert in anything was once a beginner.*

Sunday	Monday	Tuesday	Wednesday
3	4	5	6
10	11	12	13
17	18	19	20
24	25	26	27
31			

Thursday	Friday	Saturday
	1	2
7	8	9
14	15	16
21	22	23
28	29	30

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VOLUNTEER HOURS

**PRIORITIES THIS MONTH:**

- .....
- .....
- .....
- .....
- .....

**QUARTERLY/ANNUAL TASKS:**

- .....
- .....
- .....
- .....

**DAILY HABITS**

.....

(1) (2) (3) (4) (5) (6) (7) (8) (9) (10) (11) (12) (13) (14) (15) (16) (17) (18) (19) (20) (21) (22) (23) (24) (25) (26) (27) (28) (29) (30) (31)

.....

(1) (2) (3) (4) (5) (6) (7) (8) (9) (10) (11) (12) (13) (14) (15) (16) (17) (18) (19) (20) (21) (22) (23) (24) (25) (26) (27) (28) (29) (30) (31)

.....

(1) (2) (3) (4) (5) (6) (7) (8) (9) (10) (11) (12) (13) (14) (15) (16) (17) (18) (19) (20) (21) (22) (23) (24) (25) (26) (27) (28) (29) (30) (31)



Sunday	Monday	Tuesday	Wednesday
3	4 • 4th of July! 🌈	5	6
10 • Exec. Meeting	11 • Board Meeting	12	13
17 • bpm - City Hall	18	19 11am - Eduardo visit	20
24	25	26	27
31			

**PRIORITIES THIS MONTH:**

- Fundraising packet
- permit for August event
- 
- 
- 

**QUARTERLY/ANNUAL TASKS:**

- \$/building improvements report
- # of jobs added for report
- #/B - public sector improvements
- 
- 

Thursday	Friday	Saturday
	1	2 • 10am - parade
7	8 • bpm - After Hours Shopping Event	9
14	15 • NMMS Roundtable 10am	16
21	22 • UNIPIN grant due	23 • 2pm - Tina's Softball game
28	29	30
11am - Will's visit		

**DAILY HABITS**

- Drink Water  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
- Post to Social Media  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
- Meditate  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

# 07

JULY 2022

*The expert in anything was once a beginner.*



- I definitely want to get the board together to discuss a possible retreat this month.

VOLUNTEER HOURS
20







# E.V.

- Check Papi's Pies business plan
- Follow up w/ Sean & Rheg
- Applications out for Cityville Forge
- Redevelopment workshop
- 

## VISITS \*

- Kristy's Donuts**  
Improvements:
- Coffee World**  
Improvements:
- Nails 'R' US**  
Improvements:
- Cityville Manor**  
Improvements:
- Cityville Brewery**  
Improvements:

VISIT NOTES

# design

- pick out paint colors
- print plan @ staples
- Meet w/ Clide cafe
- 
- 

## \$ SPENT :

7/2	Binders, staples (7)	\$ 40.00
7/2	Dividers, staples	\$ 20.00

Report to treasurer

Don't forget to ask about specials while visiting.

# Promo

- Event task force meeting
- Make Bob IG Admin (FB)
- Check our IG Analytics
- move logo files to a shared drive
- Get quote for event posters.

## POST IDEAS

- Business Spotlight
- Volunteer Spotlight
- Event Info
- How to volunteer
- Success story
- History
- Shop of the week

6-8 Hashtags!

post at 9am

# Org

- Review new board policy
- Follow up w/ Fundraising comm.
- Make board binders
- Rework fundraising strategy
- Apply for a grant

## VOLUNTEER #5

\* value : \$ 28.54 PER HOUR

7/2: Kerry Donald	5
7/2: Faye Smith	3
7/14: Clayton B.	8
7/17: Josie Priceton	3
7/13: Board meeting 7x5hr.	35







MONDAY 4

TUESDAY 5

WEDNESDAY 6

MORNING

AFTERNOON

EVENING

Start Up Routine

Start up

check emails

new task review

★ FOCUS

Research grants

District walk-thru

LUNCH

[FLEX]

★ FOCUS

Clark Build. serv. req

organize photos

Schedule meetings

Grab quick bite

EXEC. Board Meeting

Shut down

Shut Down Routine

Start Up Routine

Tina to school

Start up

check emails

check in w/ pres.

★ FOCUS

Content for fundrai.

Research printers

LUNCH

★ FOCUS

create social graph.

[FLEX]

Start Up Routine

Start up

check emails

Meeting w/ CENTRO

★ FOCUS

grant application

LUNCH

Meeting w/ Lucas

[FLEX]

Meeting w/ Doug

DINNER

Shut down

Shut Down Routine

CALLS

Byce - grant question

Blanca - Radio spot

EMAILS

Daniel G - Serv. Req. Centro

EMAILS

Robyne - workshop

CALLS

Bella - check-in

EMAILS

Jessie M - proj. feature

Michael - proj. question

! Patricia called & wants to review the content for fundraising packet. - avail. in 2 weeks.

THURSDAY 7

FRIDAY 8

WEEKEND 9-10

MORNING

AFTERNOON

EVENING

Start Up Routine

Tina to school

Invoice city

check emails

check in w/ pres.

★ FOCUS

grant application

LUNCH

public meeting - city hall

Meeting w/ Sarah P.

[FLEX]

AH! BOOK club

DINNER

Shut down

Shut Down Routine

Start Up Routine

Tina to school

Start up

check emails

NMMS Roundtable

LUNCH

Clark building review

Meeting w/ pres.

next week tasks

DINNER

Shut down

Shut Down Routine

- Laundry
- check on bills
- post office run
- grocery shopping
- Museum w/ Tina

- NEXT WEEK
- Stop by print shop.
  - Amy visit prep?

CALLS

Cara - upcoming

Kristina - fundraising

Bella - check-in

EMAILS

Pam - County

Chris W. - permit

CALLS

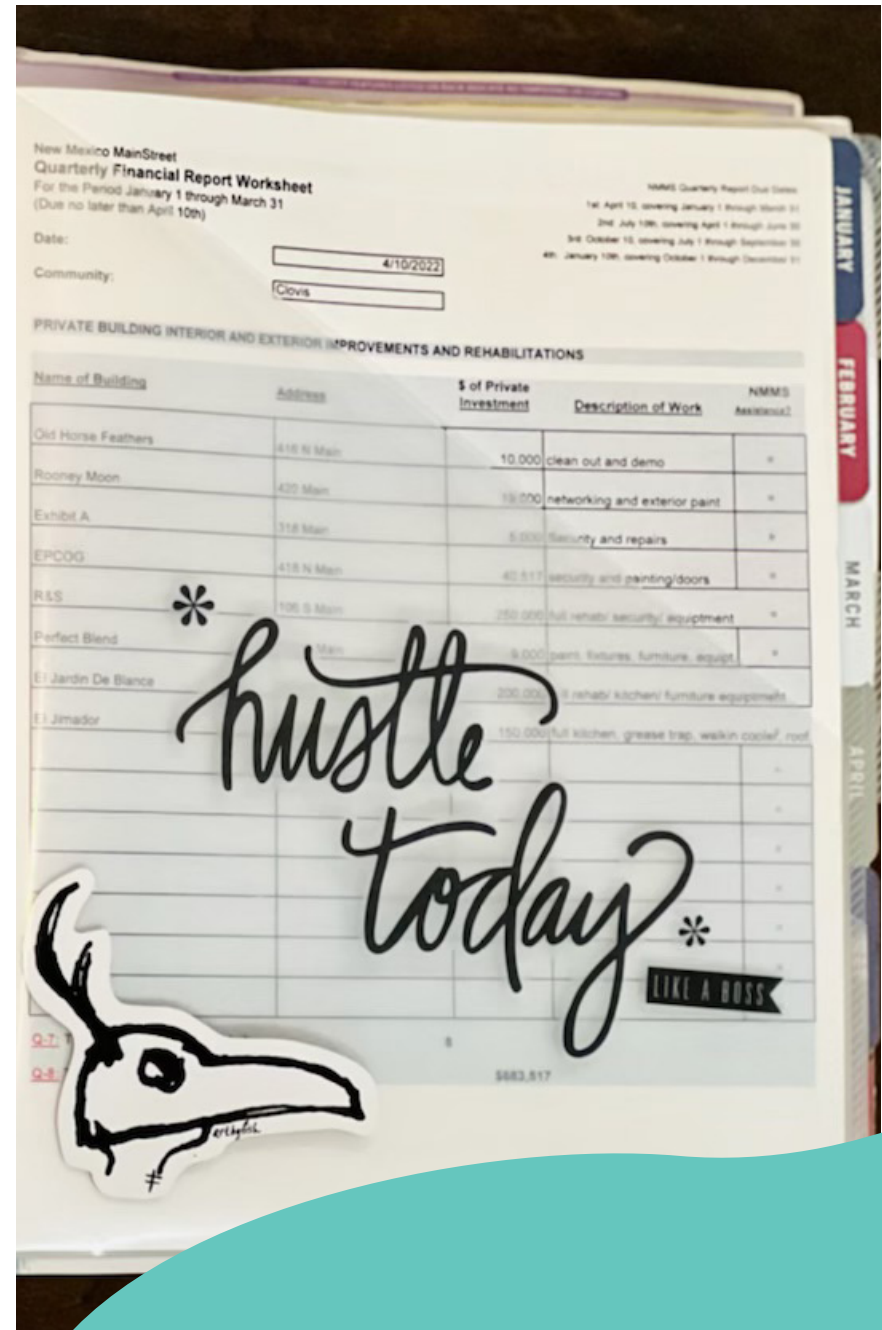
Sindy - CLAW meeting

EMAILS

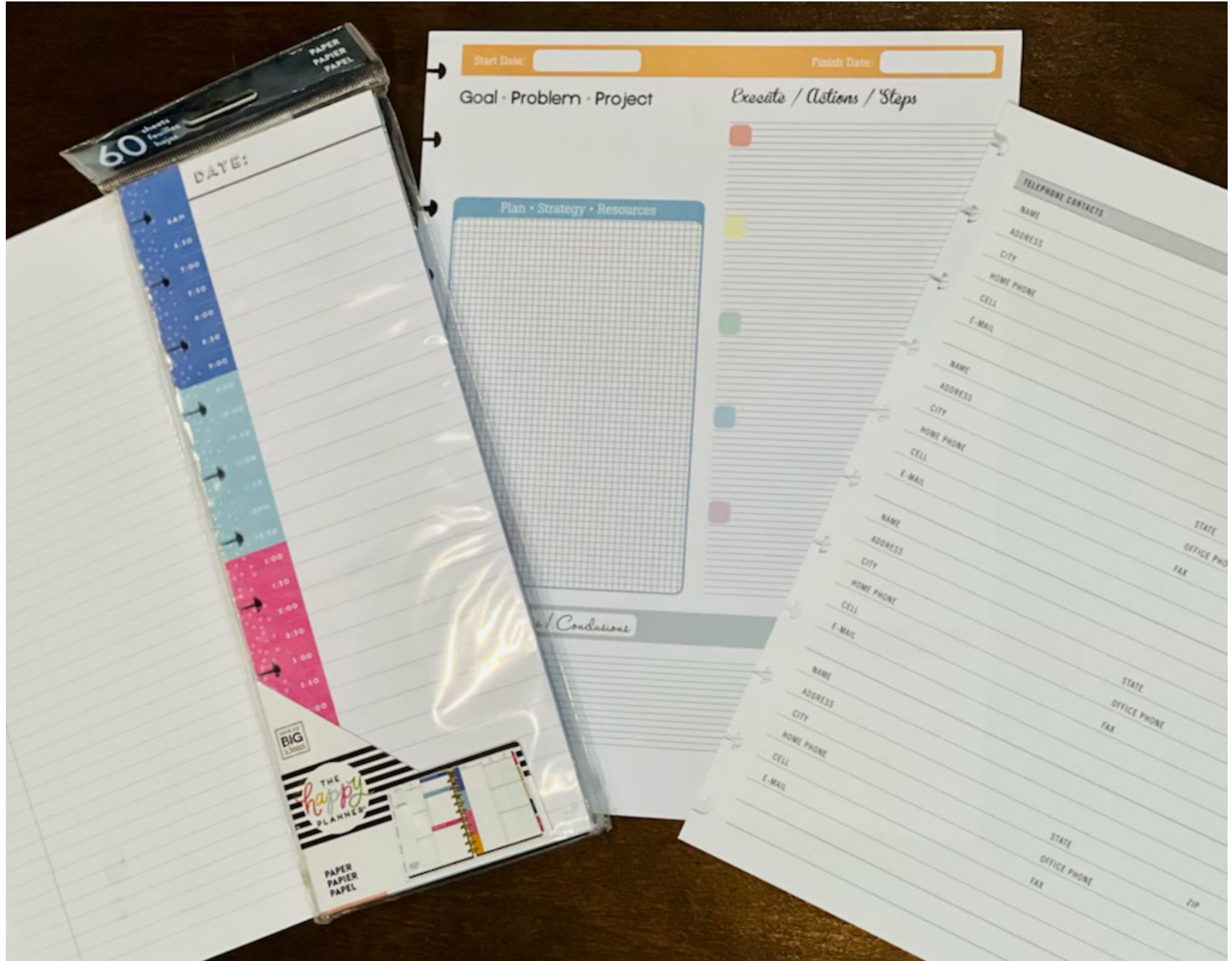


up next: Lisa













up next: Robyne



**Comments from  
Other ED Testers?**

# Our Next Steps



# Q & A



**TRY IT OUT!**  
**OCTOBER - DECEMBER 2022**

[bit.ly/nmmsplanner2022](https://bit.ly/nmmsplanner2022)

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**DOWNLOAD FILES TO YOUR  
LOCAL SYSTEM**

*(in case they ever move)*

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# Thank You!



**ROBYNE BEAUBIEN**

*NMMS Promotion  
Robyne Beaubien Consulting*

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575.693.0814



**JULIA ROYAL**

*NMMS Graphic Design  
Leighton Moon*

[hello@leighton-moon.com](mailto:hello@leighton-moon.com)  
912.655.0341



**TRY IT OUT!**  
**OCTOBER - DECEMBER 2022**  
[bit.ly/nmmsplanner2022](https://bit.ly/nmmsplanner2022)

