

<p>[L]eads / [C]onsultation / [P]roposal</p> <ul style="list-style-type: none"> <input type="checkbox"/> Susannah <input type="checkbox"/> Maurice - questions <input type="checkbox"/> Buffy <input type="checkbox"/> Nancy <input type="checkbox"/> Lara <input type="checkbox"/> Catherine <input type="checkbox"/> Michael <p>Don</p> <ul style="list-style-type: none"> <input type="checkbox"/> Drapery proposal <input type="checkbox"/> Order drapes <input type="checkbox"/> Order furniture <p>Lani</p> <ul style="list-style-type: none"> <input type="checkbox"/> Real plant for corner <p>Victoria</p> <ul style="list-style-type: none"> <input type="checkbox"/> Update Tally <input type="checkbox"/> Wallpaper <input type="checkbox"/> Paint / Hook Info <input type="checkbox"/> Update for shipping for Mirror <input type="checkbox"/> Send credit back for shipping <input type="checkbox"/> New plant for LR corner (Maclaw?) <input type="checkbox"/> FU <ul style="list-style-type: none"> <input type="checkbox"/> Tile <input type="checkbox"/> Roller blinds 	<p>Buffy</p> <ul style="list-style-type: none"> <input type="checkbox"/> Coffee table <p>Catherine R</p> <ul style="list-style-type: none"> <input type="checkbox"/> FU Lily drapes <input type="checkbox"/> Hooks <p>Susan M</p> <ul style="list-style-type: none"> <input type="checkbox"/> FU Sconces <p>Kristy</p> <ul style="list-style-type: none"> <input type="checkbox"/> First Invoice <input type="checkbox"/> Schedule Kick-Off <hr/> <p>Errands</p> <ul style="list-style-type: none"> <input type="checkbox"/> Tonic <ul style="list-style-type: none"> <input type="checkbox"/> Victoria Rod <input type="checkbox"/> Yorkdale <ul style="list-style-type: none"> <input type="checkbox"/> Pottery Barn <input type="checkbox"/> Crate & Barrel <input type="checkbox"/> Cat bowls <input type="checkbox"/> New towel <input type="checkbox"/> Lani - Fresh
<p>GOAL 1 - HIGHER PAYING CLIENTS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Survey about me to previous clients <input type="checkbox"/> Free consultation for Rotary <input type="checkbox"/> Rotary explanation of what I do 	<p>GOAL 2 - IMPROVE PROCESSES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Design process handout <input type="checkbox"/> Natalie's revisions to Studio MBD <input type="checkbox"/> Create email template by phase <ul style="list-style-type: none"> <input type="checkbox"/> Inquiry <input type="checkbox"/> Lead funnel <input type="checkbox"/> Discovery Call Funnel <input type="checkbox"/> Consultation Funnel <input type="checkbox"/> Client <input type="checkbox"/> Timeline example of each phase <input type="checkbox"/> Audio/visual consulting <input type="checkbox"/> Scripts <input type="checkbox"/> New Scope agreement <input type="checkbox"/> Wallpaper install email (Phase 2) <input type="checkbox"/> Style Survey <ul style="list-style-type: none"> <input type="checkbox"/> Furniture examples <input type="checkbox"/> Nail down style
<p>GOAL 3 - Health / Cleaning / Finances</p> <ul style="list-style-type: none"> <input type="checkbox"/> Cleaning lady <input type="checkbox"/> Save \$1000 for emergency <input type="checkbox"/> Reno 	<p>MISC</p> <ul style="list-style-type: none"> <input type="checkbox"/> Project Delay fee in contract <input type="checkbox"/> Blank business cards <input type="checkbox"/> Order Thank You Cards <input type="checkbox"/> Podcast Ep 12 <ul style="list-style-type: none"> <input type="checkbox"/> Schedule Podcast Call with financial dude <input type="checkbox"/> Open new account in BMO for cushions <input type="checkbox"/> Order accessories <input type="checkbox"/> Car - breaks, clutch fluid <input type="checkbox"/> Podcast Calls <ul style="list-style-type: none"> <input type="checkbox"/> Dr. Shar Rai <input type="checkbox"/> Samshecter <input type="checkbox"/> Submit claims