

How to use the plan page

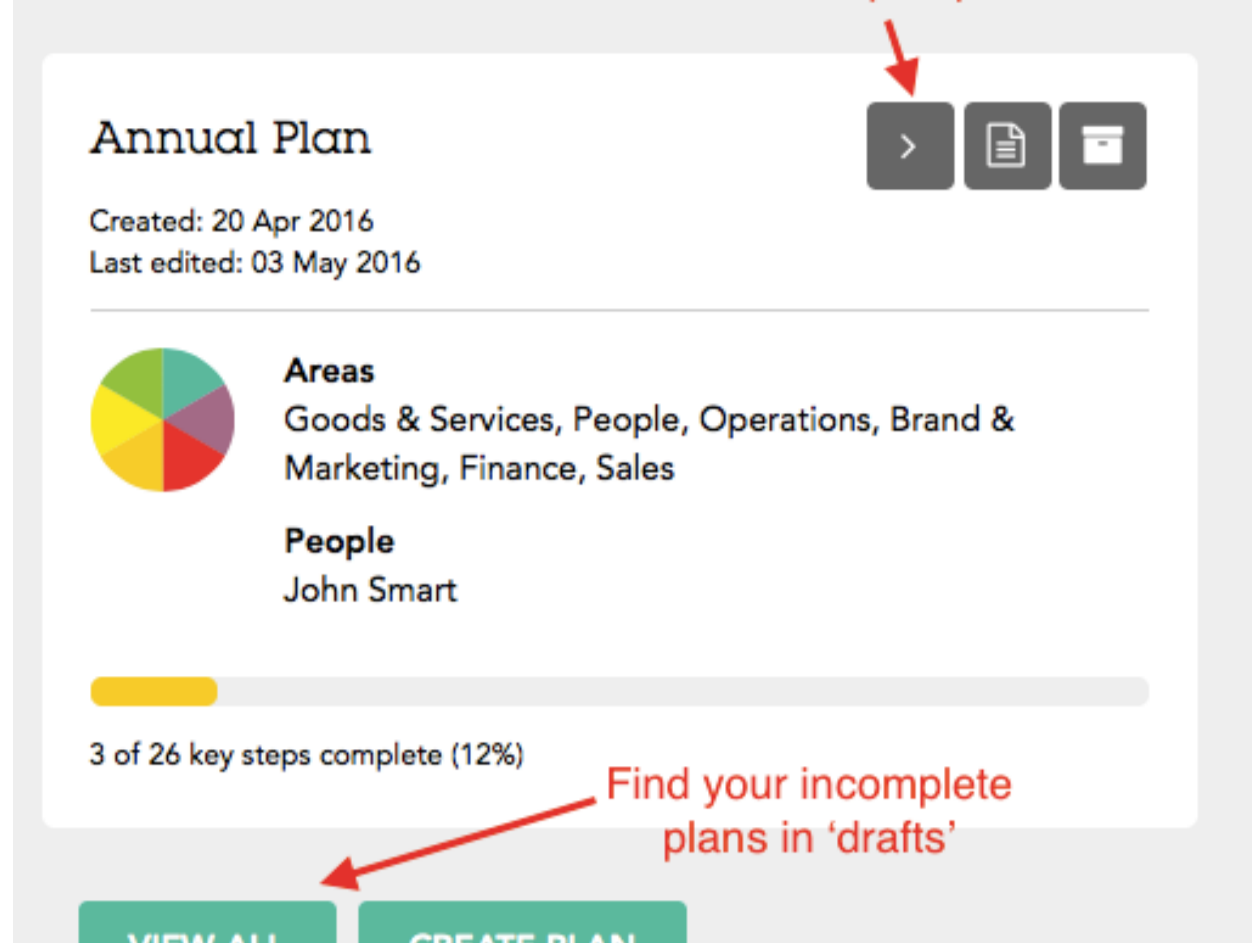
The plan page is like a map for your business; it helps everyone stay on course.

The best way to get results from Business Sorter is to review and update your plan page regularly, even daily, using it as a working document.

Book weekly or fortnightly meetings to review progress with others, or include the plan review as part of your existing individual or team meetings.

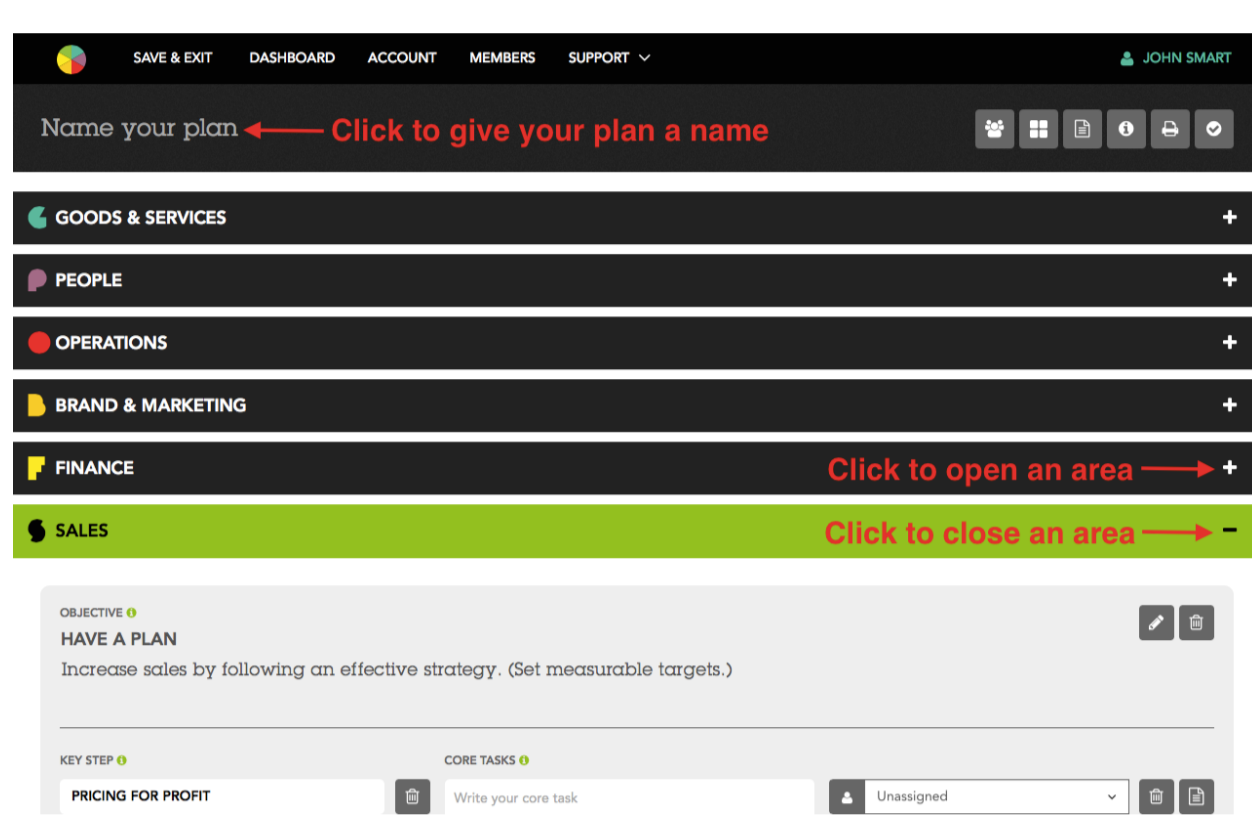
When you create a new plan using Business Sorter, you will end up on the plan page. To open an existing plan, go to your Business Sorter dashboard, locate the plan you want to view, and click on the '>' button in the plan summary.

Please note: If you start creating a plan but don't finished it, you can open it from 'Drafts', which you will find by clicking the 'View all' button on your dashboard.

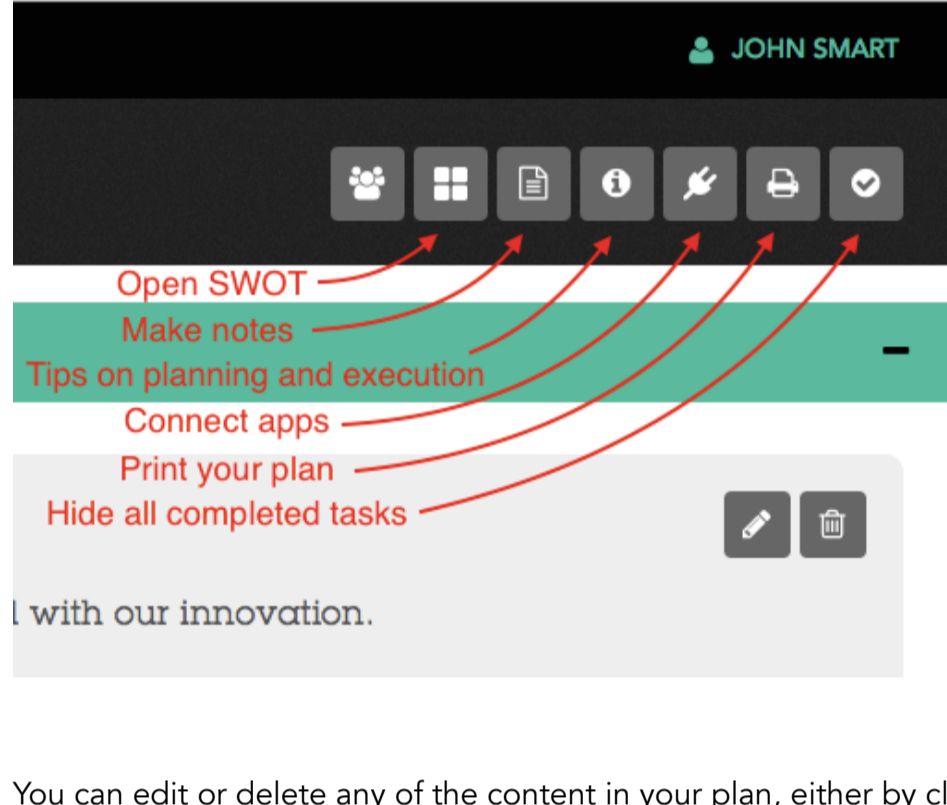


When you create a new plan, it's a good idea to name it so that it's easy for you to distinguish between different plans on your dashboard.

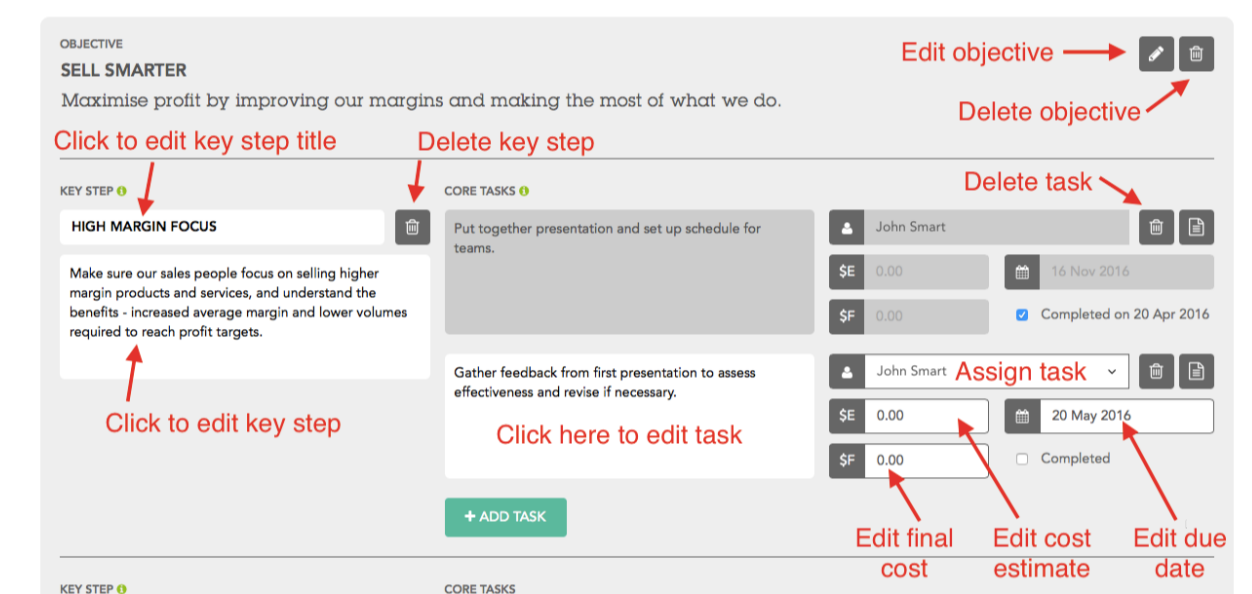
Your plan is presented in a concertina format. To view an area, e.g., 'Sales', click the '+' symbol on the right-hand side of the concertina bar.



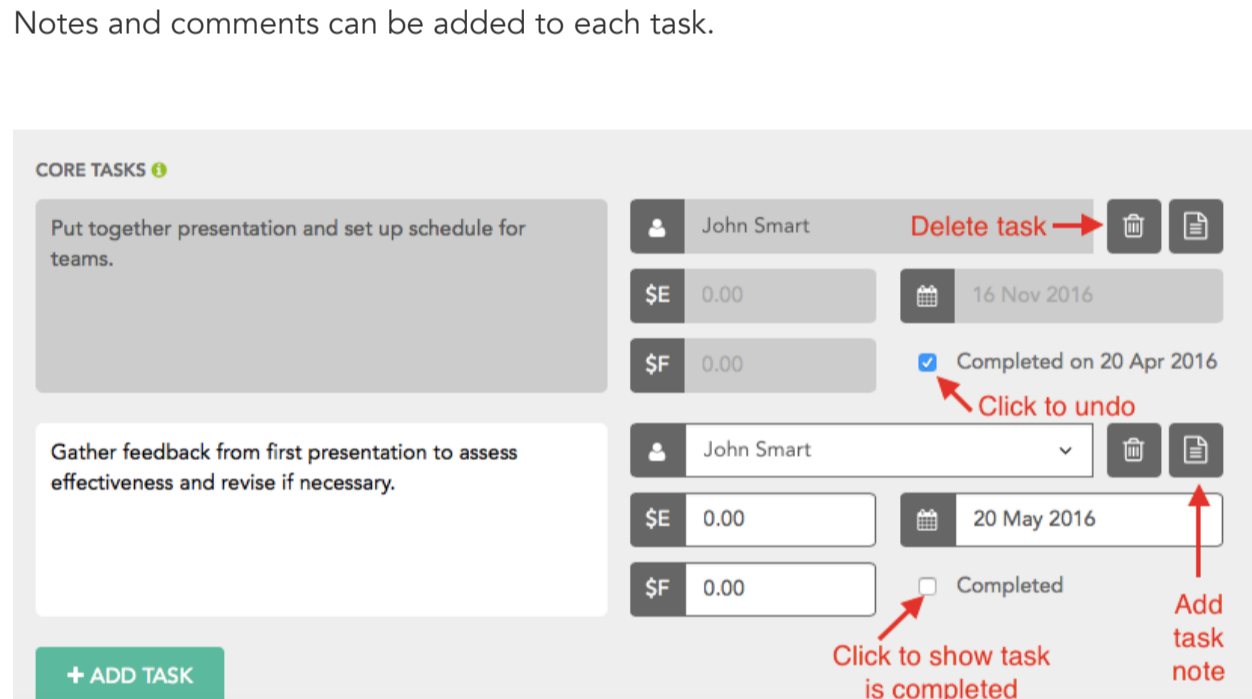
In the top right-hand corner of the plan page you will see a row of buttons with various functions.



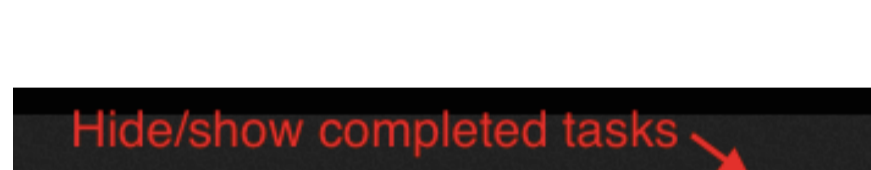
You can edit or delete any of the content in your plan, either by clicking a button or clicking directly on a text field.



When you click the 'Completed' tick box for a task, all the fields for that task will change from white to grey. This can be undone by clicking the tick box a second time. Notes and comments can be added to each task.

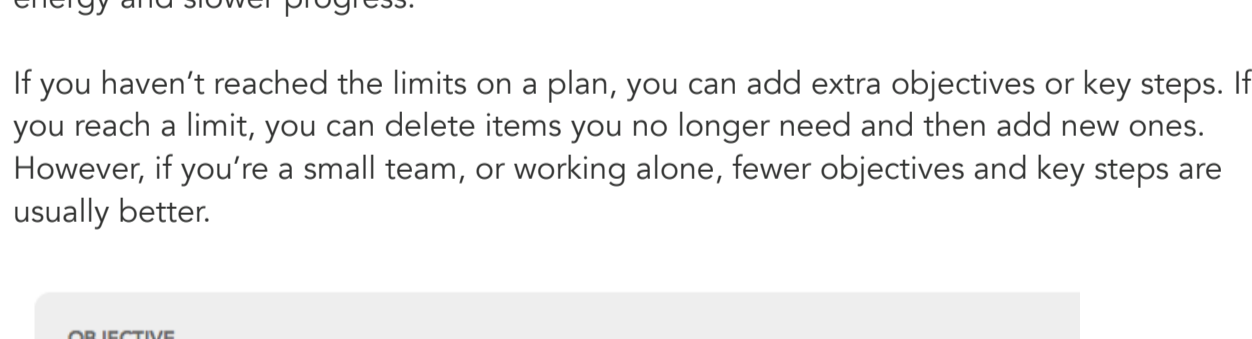


If you want to clear away completed tasks, you can either delete them permanently (see diagram above), or hide them temporarily by clicking the '✓' button in the top right-hand corner of the page (see below).

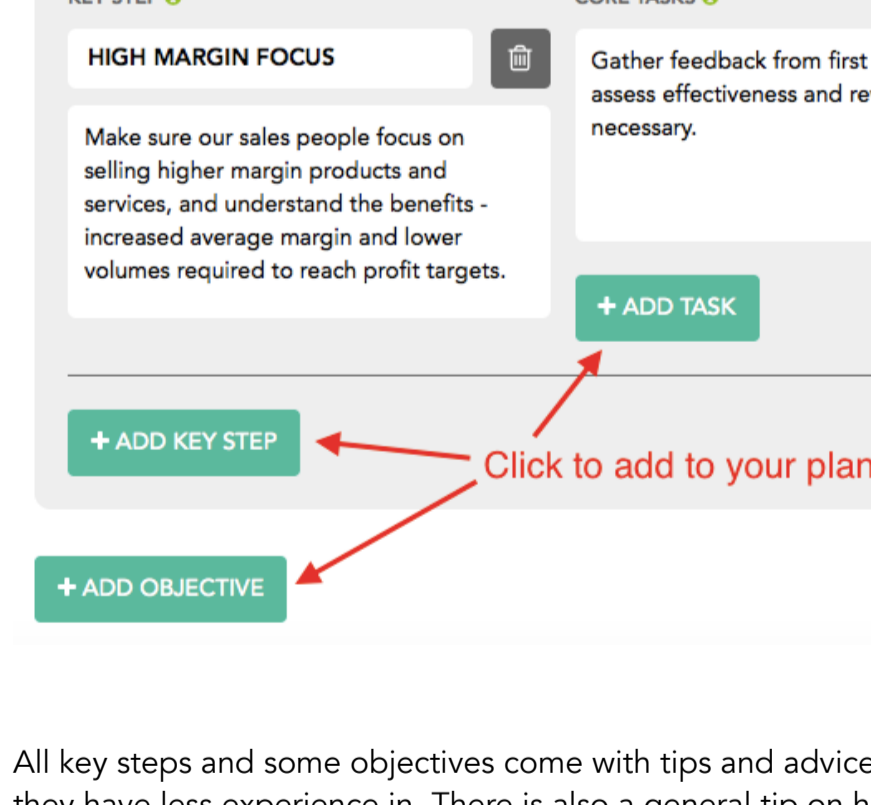


A plan can have up to 7 objectives and each objective can have up to 7 key steps. You can also add up to 20 tasks under each key step. The reason for setting limits is to maintain focus and avoid the feeling of being swamped, which often leads to scattered energy and slower progress.

If you haven't reached the limits on a plan, you can add extra objectives or key steps. If you reach a limit, you can delete items you no longer need and then add new ones. However, if you're a small team, or working alone, fewer objectives and key steps are usually better.



All key steps and some objectives come with tips and advice to help your team in areas that have less experience in. There is also a general tip on how to use the 'Core tasks' field.



Some tips include additional relevant material. For instance, there are links to Business Sorter articles and templates, links to informative third-party websites, as well as recommended books and articles. When you click on the green 'i' symbols, a pop-up window will open, like this:

