

How to leverage ChurnZero to plan your day



How does your team spend their time? (Breakdown by %)

i.e. 10%: Admin & Emails

____%: _____

____%: _____

____%: _____

____%: _____

____%: _____

Write a list of things that your team does everyday

i.e. Sends welcome email to new clients

Circle the items that are reactive actions that your team is taking.

For example, a reactive action is when your client emails you that there is a problem and you resolve it and let them know.



List the actions your team takes over the course of the day in the appropriate boxes.

Manual

Semi-Automated

Automated

Where would your team's time go if you could plan it?

___%: _____

___%: _____

___%: _____

___%: _____

___%: _____

___%: _____