

2027 PLANNER

My Client Cadence

Good work, kindly kept.

DEVICE	CALENDAR	WEEK START
iPad 11-inch / Goodnotes	2027	Monday

YEAR AT A GLANCE

01 January	02 February	03 March	04 April
05 May	06 June	07 July	08 August
09 September	10 October	11 November	12 December

INCLUDED

12 months - 53 client weeks - 12 client tools - 12 meeting notes
Monday start - promise-led follow-through - hyperlinked navigation

WEEK INDEX	THIS WEEK	THIS MONTH	CLIENTS
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DEC 28 - JAN 3

Client Cadence

Keep client outcomes, conversations, and promises visible in one weekly view.

THREE CLIENT OUTCOMES

1

2

3

MON

28

CLIENT / WORK

FOLLOW-UP / DUE

TUE

29

CLIENT / WORK

FOLLOW-UP / DUE

WED

30

CLIENT / WORK

FOLLOW-UP / DUE

THU

31

CLIENT / WORK

FOLLOW-UP / DUE

FRI

1

CLIENT / WORK

FOLLOW-UP / DUE

SAT

2

CLIENT / WORK

FOLLOW-UP / DUE

SUN

3

CLIENT / WORK

FOLLOW-UP / DUE

CONVERSATIONS

PROMISES DUE

WAITING ON CLIENT

INVOICE / ADMIN

WEEKLY RELATIONSHIP REVIEW

JAN

IDX

next week >

QUIET BLOOM PRESS

15

CLIENTS

Client Portfolio

See every active relationship, current outcome, and next promise together.

CLIENT	CURRENT OUTCOME	NEXT PROMISE	CONVERSATION	STATE

CLIENTS

Relationship Review

Review value, communication, boundaries, and the next honest conversation.

VALUE DELIVERED / EVIDENCE

WHAT THE CLIENT NEEDS NEXT

WHAT IS WORKING

FRICTION / BOUNDARY TO ADDRESS

RENEWAL / CLOSE / NEXT CONVERSATION

NOTES

Client Meeting 01

Capture context, decisions, and promises while the conversation is fresh.

CLIENT

DATE / TIME

FORMAT

OUTCOME / ATTENDEES

AGENDA / QUESTIONS	CONVERSATION NOTES

DECISIONS

PROMISE / FOLLOW-UP	OWNER	DUE	STATE