

UNDATED PLANNER

My Contact Keeper

Remember the person, not only the details.

DEVICE

CALENDAR

WEEK START

iPad 11-inch / Goodnotes

Undated

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 - 52 weeks - Goals - Habits - Notes

Layout - agenda week - grid month

WEEK INDEX	THIS WEEK	THIS MONTH	ORGANIZE
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MONTH 1

Contact Month

W	MON	TUE	WED	THU	FRI	SAT	SUN
01	W1						
02	W2						
03	W3						
04	W4						
05	W5						

WEEKS

W1

W2

W3

W4

W5

WEEK 1

Connection Week

Keep useful context and thoughtful follow-up without turning relationships into a sales pipeline.

PERSON / COMMUNITY		REASON TO CONNECT	BOUNDARY / PREFERENCE

MON	REACH OUT / RESPOND / UPDATE	FOLLOW-UP DUE
1		
TUE	REACH OUT / RESPOND / UPDATE	
2		
WED	REACH OUT / RESPOND / UPDATE	DETAILS TO CONFIRM
3		
THU	REACH OUT / RESPOND / UPDATE	
4		
FRI	REACH OUT / RESPOND / UPDATE	INTRODUCTIONS
5		
SAT	REACH OUT / RESPOND / UPDATE	
6		
SUN	REACH OUT / RESPOND / UPDATE	RECORDS TO ARCHIVE
7		

ORGANIZE

Contact Privacy and Scope

Decide what belongs in this organizer and exclude passwords, full financial details, and unnecessary sensitive data.

PURPOSE OF THE BOOK	DETAILS I NEED
DETAILS I WILL NOT STORE	CONSENT / PREFERENCE
SECURE STORAGE	ARCHIVE / DELETION RULE

CONNECT

Contact Record

Capture the details and context needed for respectful future communication, and no more.

NAME / PRONUNCIATION	ROLE / RELATIONSHIP
CONTACT ROUTES	REGION / TIME ZONE
PREFERENCES / BOUNDARIES	CONTEXT / LAST VERIFIED