

# App Introduction and Overview

# The FranklinCovey Planner App

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# The FranklinCovey Planner Solution

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Android

iPhone



Web

Exchange

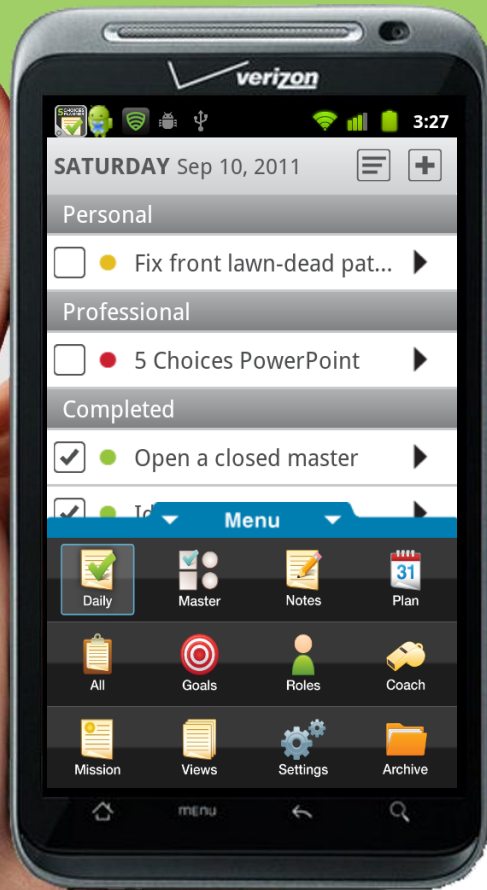
# Franklin Covey Planner App

## Mobile Productivity



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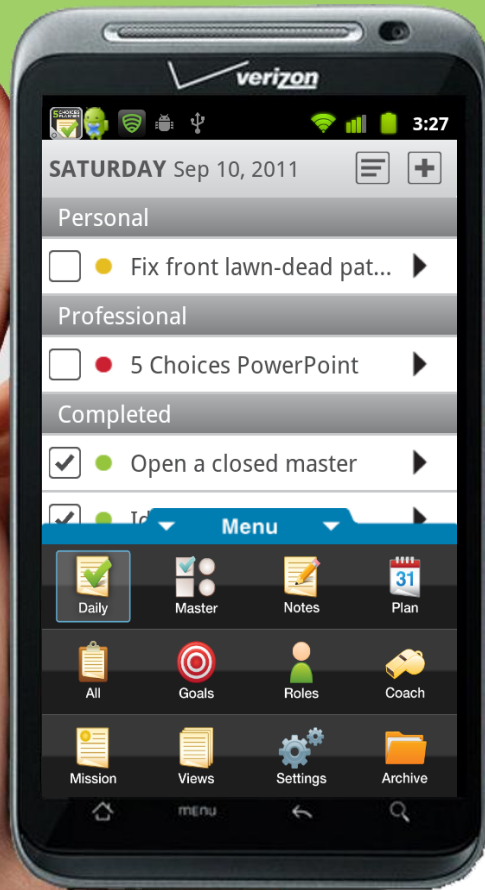
## Intuitive Navigation Menu







- Tap the Menu tab to open the Navigation Drawer
- Easily navigate to anywhere in the app by tapping on the desired icon

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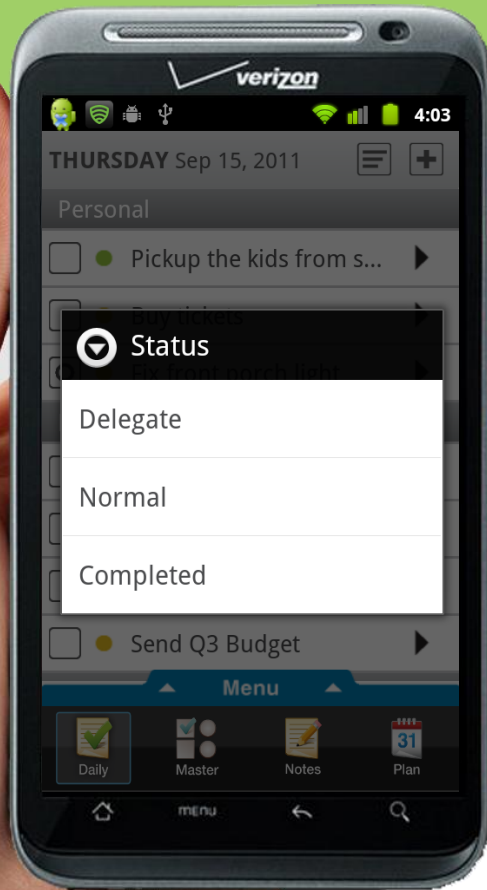
## Adding & Managing Tasks



- Tap  to enter new tasks
- Tap  to drag and drop your tasks
- Tap  to change the priority
- Tap  to set your task status
- Completed Tasks appear in the *“Completed”* section until the end of the day. At the end of the day they move to the archive

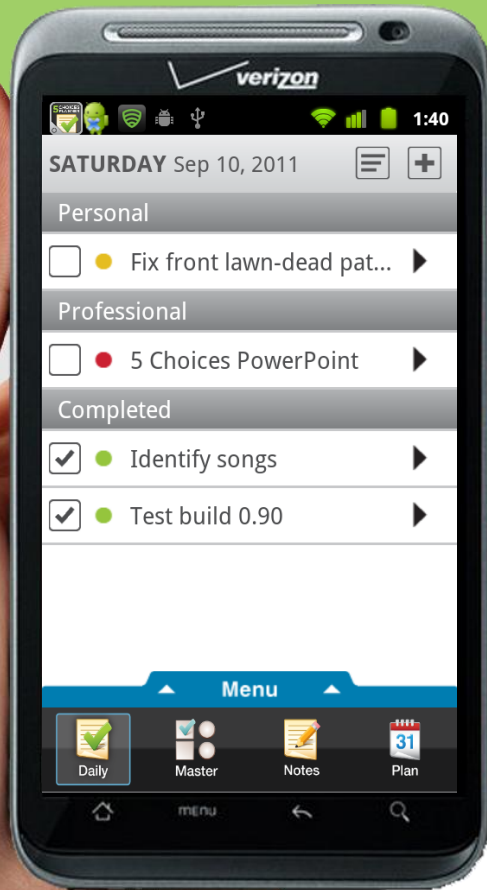
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## Action Codes



- Tap  to open the action codes
- Select:
  - **Delegate** – to send a task to someone else
  - **Normal** - to reopen a completed task
  - **Completed** - to send a task to the archive
  - **Move** – to Today or Master

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## Tasks



Daily



Master



All

- **Today Tasks** are tasks scheduled to be completed today
- **Master Tasks** are tasks with no due date assigned
- **Scheduled Tasks** is a view of upcoming planned tasks.



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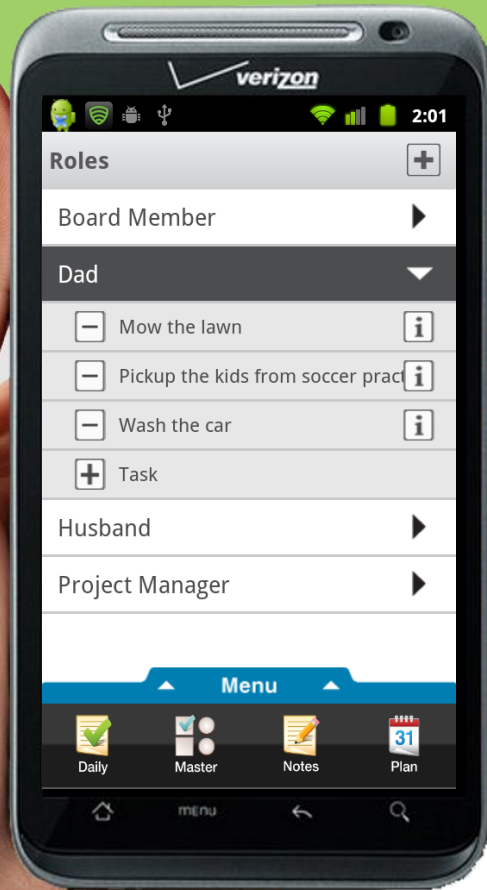
## Roles & Role Statements



- At FranklinCovey we believe that an **extraordinary life** can be created by pursuit of extraordinary *outcomes in your life's roles*.
- Tap the Roles button to enter your Role title and Role Statement that describes the outcomes you want in that role.

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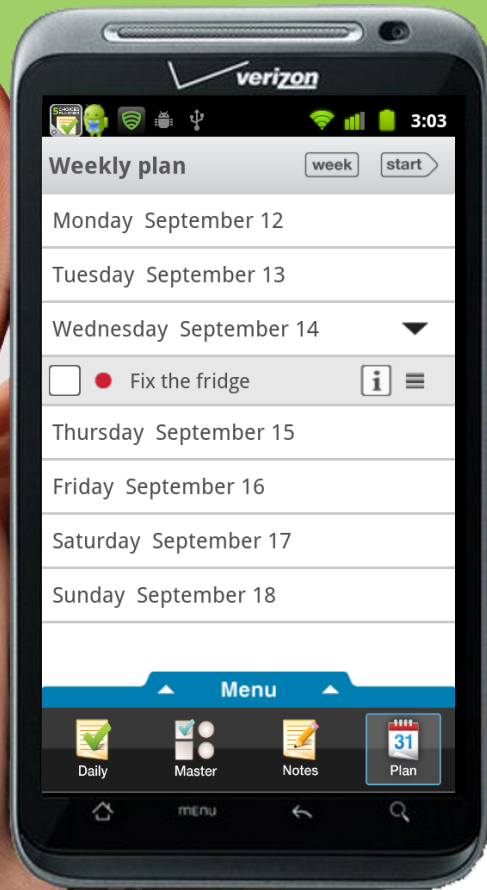
## Role Tasks



- Many tasks are role specific
  - Example: Dad – Pickup kids from soccer practice
- Create and assign role specific tasks by creating tasks within the Roles manager

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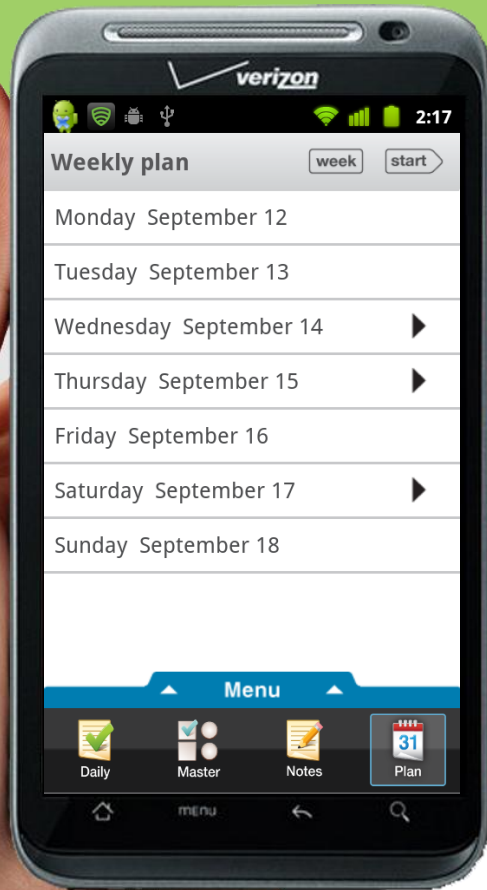
## Weekly Planning 30/10



- The time you spend in quality planning transforms the time you spend everywhere else
- The Plan wizard guides you through 5 steps to help you effectively plan your week
- Review your Roles/Goals, Schedule the Big Rocks, Schedule everything else – it's all here!

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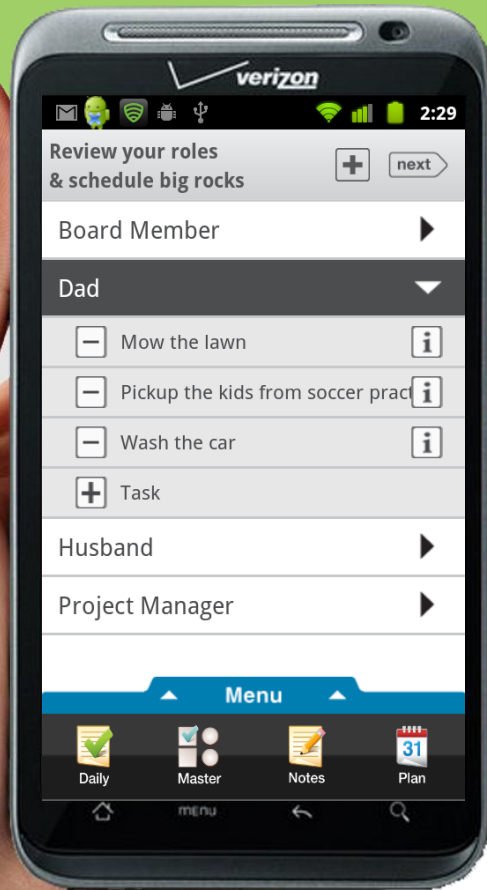
## Weekly Planning – Step 1



- Select the week you wish to plan and review the tasks already scheduled for that week
- If any tasks need to be rescheduled, do it now

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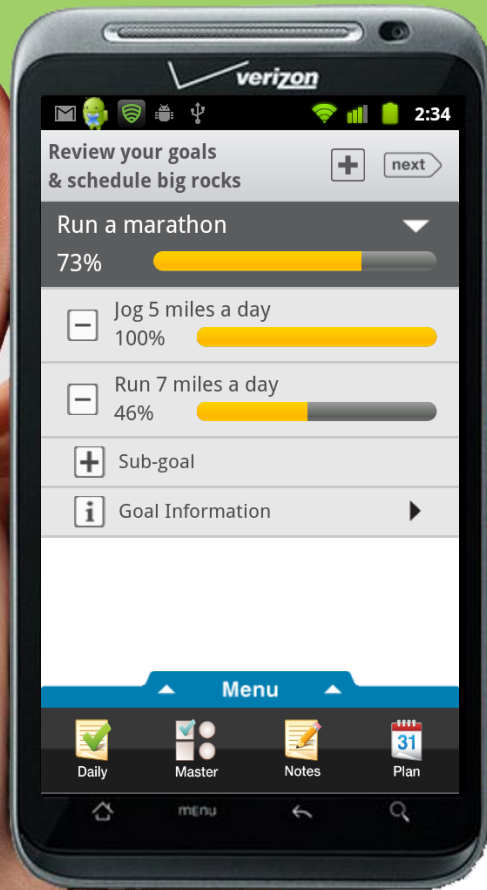
## Weekly Planning – Step 2



- Review your role contribution statements and ask yourself, **“What are the one or two most important tasks I should schedule for each role this week?”**
- Create and schedule those tasks or assign an existing task attached to those roles

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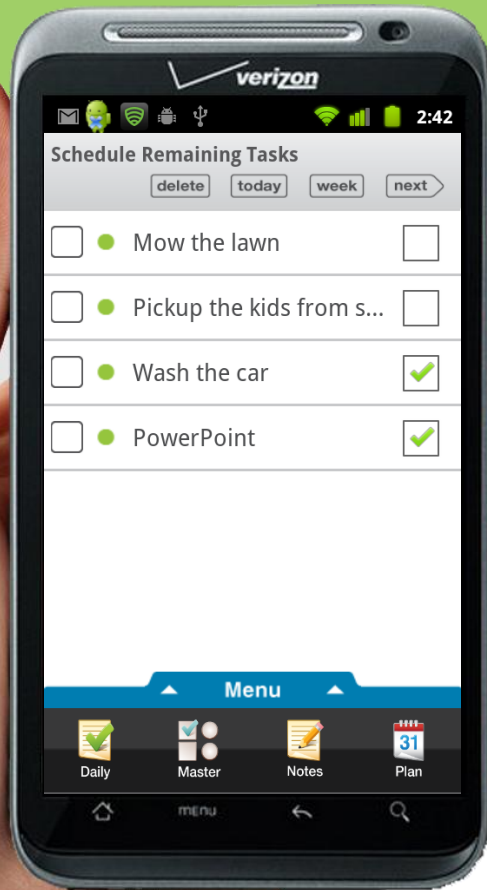
## Weekly Planning – Step 3




- Review your goals and ask yourself, **“What are the one or two most important tasks I should schedule for each goal this week?”**
- Create and schedule those tasks or assign an existing task attached to those goals

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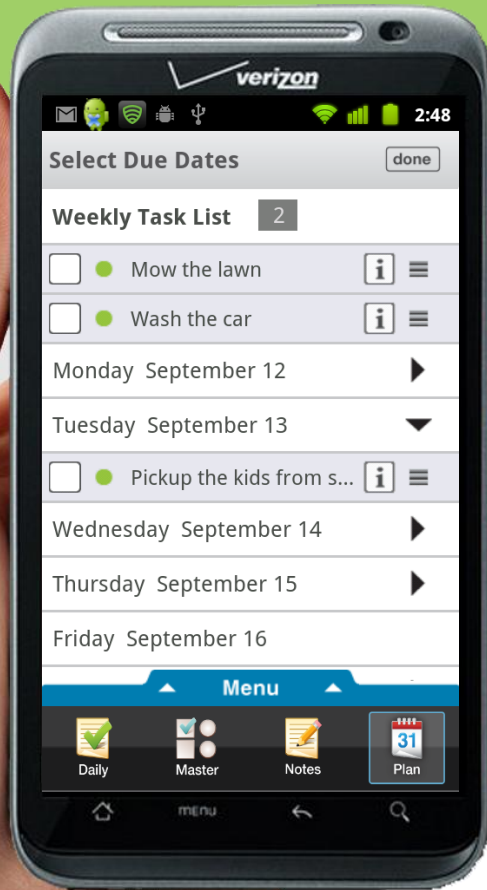
## Weekly Planning – Step 4



- Schedule your remaining tasks for the week by tapping each task to select it - 
- Once tasks are selected you can move them to today or to the week by tapping the buttons at the top of the screen.

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## Weekly Planning – Step 5

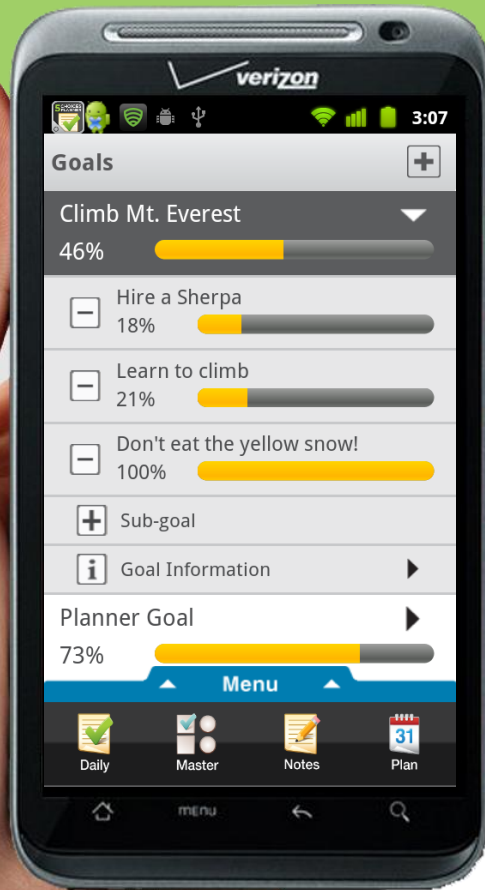


- Complete your weekly planning by **dragging and dropping** the tasks to the day you wish to do them
- Any tasks not dropped to a specific date remain in the master task list.
- Hit the Done button and voila, you have completed your weekly planning.



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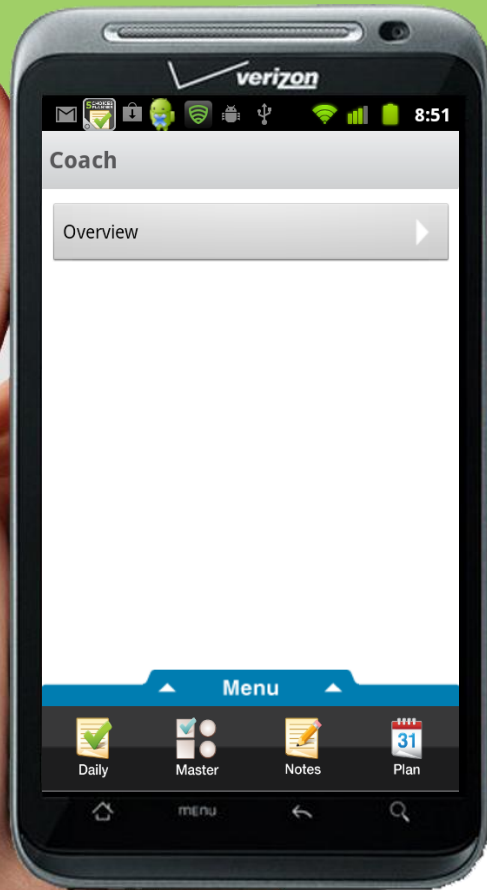
## Goals



- Plan your goals, sub goals, goal tasks and track your progress.

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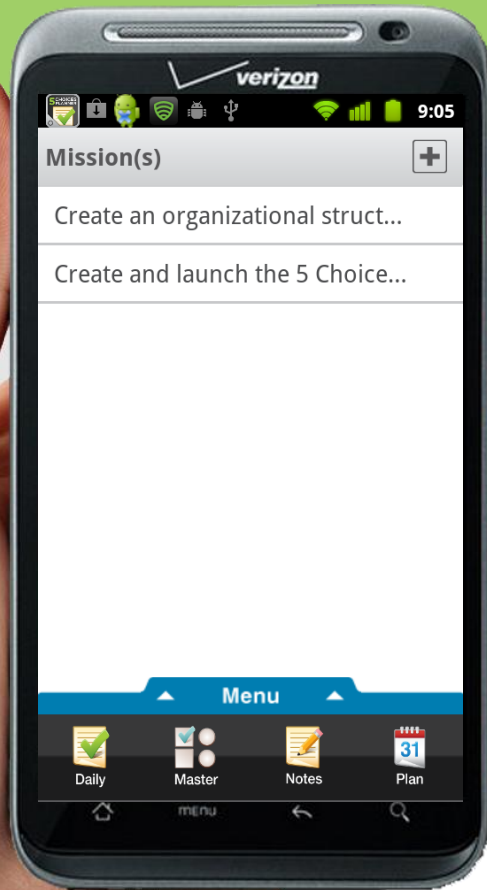
## Coach



- Tutorials show how to use the app and provides other helpful information

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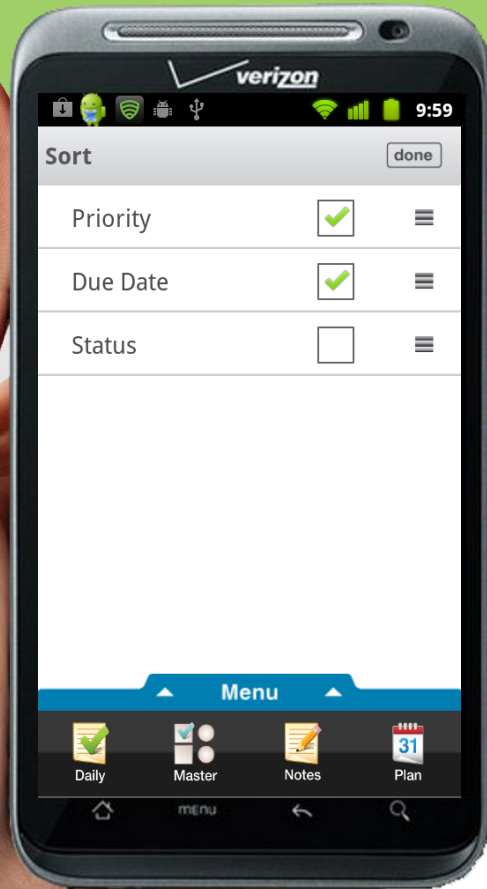
## Mission(s)



- Live With Purpose – Create mission statements to sharpen your focus and give direction to your tasks and goals.

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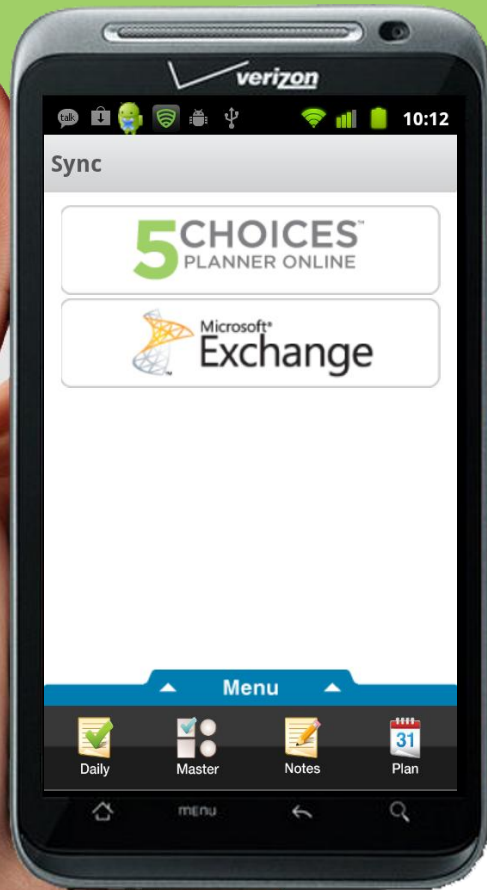
## Views - Sort



- Sort your tasks to view by Priority, Due Date and Status
- Drag and drop to determine the order of sort priority

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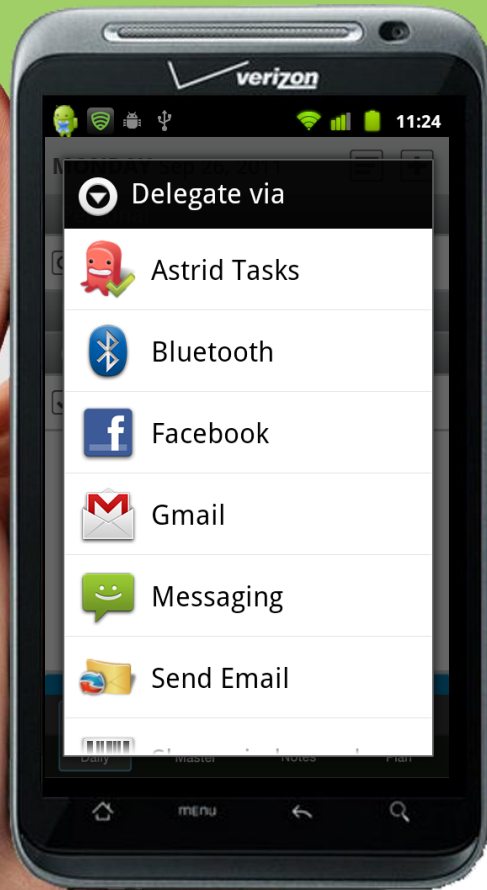
## Settings



- **Sync your data** to your desktop via Microsoft Exchange or directly to the Franklin Covey Planner website.

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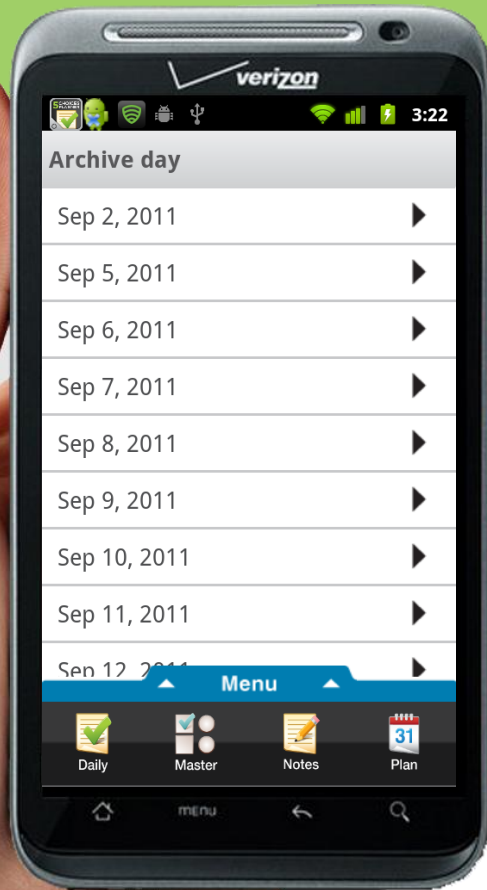
## Delegate A Task



- **Delegate a task** to someone else via the app
- Delegate via SMS text, Gmail, *Facebook etc...*

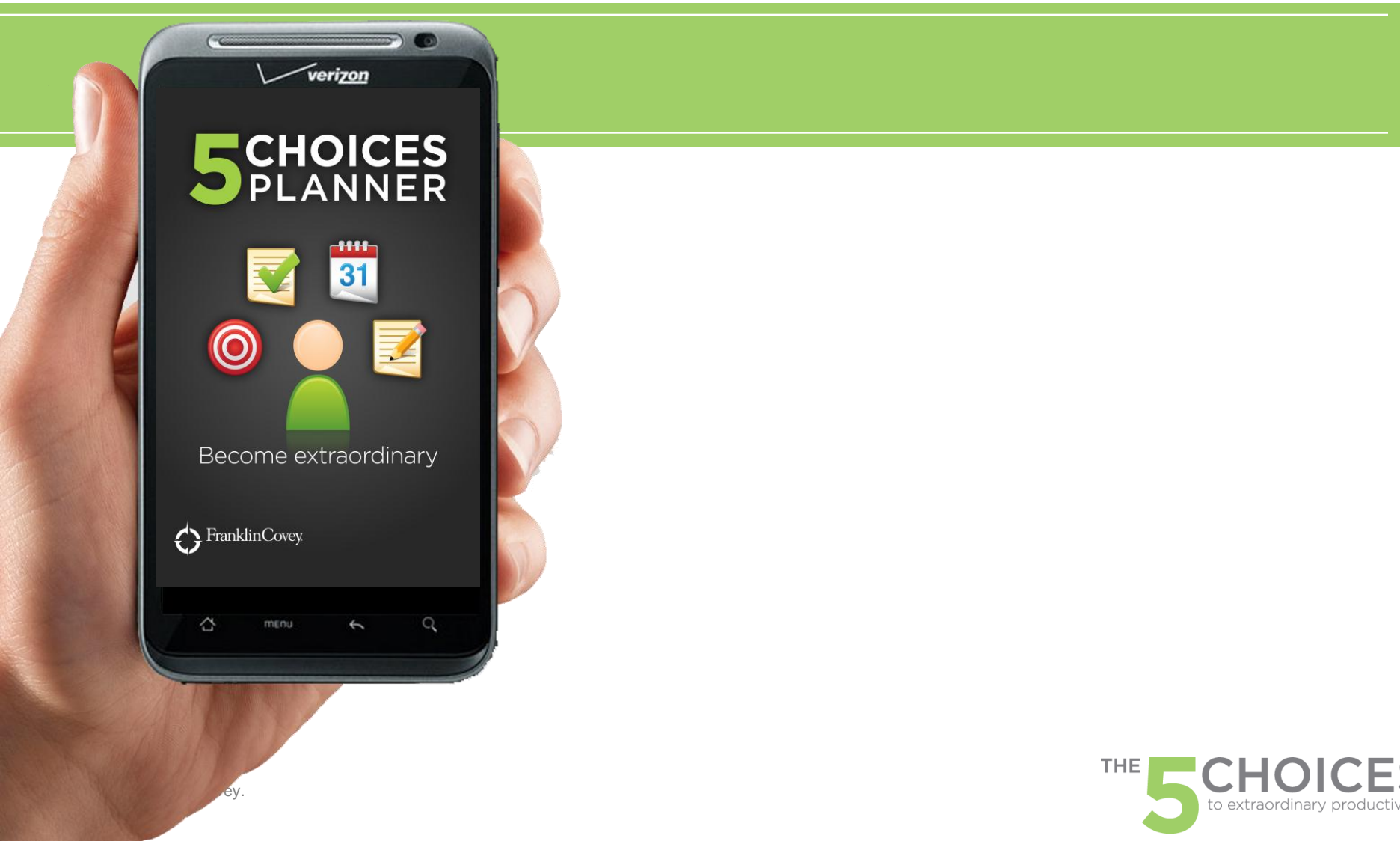
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## Archive



- Completed tasks move to the archive and are filed by year, month and day.

# Franklin Covey Planner App





# The FranklinCovey Planner Cloud

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Android

iPhone



Web

Outlook