

Planning Quick Start Guide

Step 1 – Create Planning Habit

Schedule time in your calendar (at least 10 minutes to start), at a consistent time each day, for planning. Set an alarm or a reminder for this time.

Step 2 – Obtain Tools

Print out the “Calendar” template (attached), or use your own version. Ensure that it has space for month-level tasks, week-level tasks, and a daily schedule.

Step 3 – Clear the ‘To Do’ Clutter

On a clean piece of paper, do a brain purge of all ‘to do’ items. After you have completed the first draft, ask yourself “what else?” and write for at least another 2 minutes.

Step 4 - Reflection

Looking at the To Do List, ask yourself how you feel. Identify the feeling and spend some time describing it in writing.

Step 5 - Categorize

Looking at the To Do List, categorize items into 2 categories: 1) Want To Do (WTD), or 2) Have To Do (HTD). Transpose all HTD items into WTD items and identify why you WTD. Eliminate all remaining items on the HTD list.

Step 6 – Break it Down

Break down each macro-level WTD item into micro-level steps. Ask yourself, “what would be the very next action on this task”, i.e. find the phone number, create an email, etc.

Step 7 – Prioritize

Decide on the one item that you want to accomplish today.

Step 8 - Schedule

On your calendar for tomorrow, as specifically as possible, with time frames attached, schedule:


1. Meetings and appointments
2. Prep time and commute time
3. Time to connect with others
4. Time to connect with yourself – decide if you want time to ‘check out’ and/or time for energizing activities
5. Schedule time for the one item you want to accomplish today.

MONTH:

Goal:

Thought:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

WEEK							
Thought:							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Date							
6:00							
6:30							
7:00							
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TODAY'S DATE:

Daily Thought:

Plan

Reflection

6:00

6:30

7:00

7:30

8:00

Top 3:

8:30

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Brain Dump: TO DO's