

## How to Plan Effectively Action Guide

### 1. WHAT do I need?

- To-do list
- Calendar(s)
- Project list
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



### 2. WHERE do I want to plan?

### 3. WHEN is the best time to plan?

**Daily** – Set up next day’s tasks (evening)

**Weekly** – Set week’s goals, general plan for each day. Forecast 2-3 weeks based on deadlines and upcoming projects. Friday and Sunday evenings are popular times for this. Here is my client “Sonny’s” list:

Later  
 Tomorrow  
 Today  
 **NOW**

- Identify potential "fires"
- Work on a potential "fire"
- Catch up on invoicing
- Call a potential client
- Call a past client for a referral
- Strategize how to use his resources more effectively
- Go to the gym
- File "completed" emails in the inbox
- File "completed" projects

***Create your weekly list:***

**Monthly/Quarterly** – Project planning, goal setting

***Create your monthly/quarterly list:***

**Annually** – Review what has worked or not. Project deadlines. Plan time to plan, to review, to think.

**Create your annual list:**

#### **4. HOW do I plan? What is the process?**

Use checklists to keep track of what **tasks and activities** need to be scheduled on a regular basis. Here are some broad categories to consider.

- Strategic thinking
- Client appointments
- Follow-up time for client appointments
- Standing meetings
- Marketing
- Administrative/ maintenance tasks
- Prep for client meetings
- Customer service
- Staff development/ leadership
- Project work
- Email/ voicemail processing
- Family time
- Exercise time
- Recharge time
- Planning time



Different personalities have different goals, and therefore different tasks on their checklists.

**Client A's** list looks like this:

- 6.5 hours of sleep each night
- Email processing
- Time to strategically think through items to delegate to her assistant and interns
- Meetings with her assistant and interns (NOTE: the delegation planning needs to happen BEFORE the meeting!)
- Time daily to implement the 80/20 Rule when assessing the To-Do list
- Marketing activities (her goal is to stay with 15 - 20% of the week spent marketing and often it is higher)
- Time to finish client projects

While **Client B's** list consists of:

- Organizing the kids' schedules
- Exercise
- Meal prep
- Recharge batteries (this does NOT include work functions - but total "me" time)
- Checking up on the kids' chores
- Spouse time
- Work schedule (rescheduling any meetings that were incorrectly scheduled)
- Client prep time

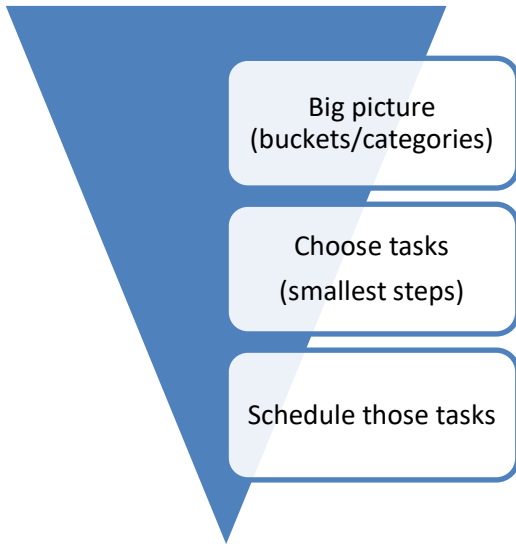
***What's on your checklist?***

Also remember to schedule **maintenance activities**. Examples include:

- Grocery shopping
- Clean house/ office
- Meal prep
- Exercise plan
- Laundry
- Water plants
- Read newsletters and blog posts
- Define "next steps" on active projects
- Review delegated activities (are you waiting for anything to come back?)
- Return to zero (clear inboxes)
- Update tracking numbers (financial, marketing, etc.)
- Back up your computer
- Plan clothes for the week
- Set all appointment reminders
- Phone calls
- Errands
- Paperwork
- Websites (that you check regularly)
- Thinking time



***What are your maintenance activities?***



Use digital or paper calendars and planners, or both!

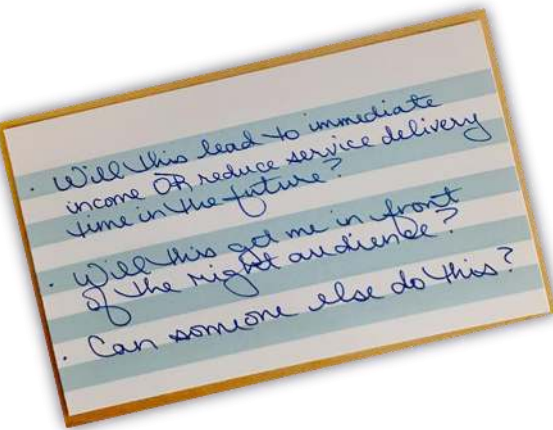
**Identify YOUR buckets! \***

Big picture:	Tasks:	Schedule:

\* The Magic 168 Process may be helpful here:

<http://bit.ly/Magic168ActionGuide>

**How will you implement those bucket tasks?**



A handy tool to help you evaluate what tasks should be listed here is to use a notecard like this.

If the task fits these criteria, then list it on your task list. If not, does this task really need to be done?

**What are your notecard criteria?**

Remember, **leave some white space** in your calendar! Schedule only 50% of your day, or leave Friday clear. Make a checklist of tasks that are useful “fillers” for excess white space.

For example:

- One that takes limited brain power (for when you are mentally drained), like filing or clearing clutter.
- One that takes LOTS of brain power (for when you revved up to do some strategic thinking), like updating your website or social media presence.
- One that takes 5 - 10 minutes (for when you only have a short amount of time).
- One that takes 90 - 120 minutes (for when you have a larger block of unscheduled time).
- One that is "one step from the money" (for when you want the cash register to ring NOW).
- One that is "2 - 3 steps from the money" (for when you want to work on filling your sales funnel)
- One that is proactive (for when you want to "get ahead of the game")

***Do you prefer to have daily white space, or less scheduled?***



**What are YOUR white space activities?**

My Biological Prime Time is \_\_\_\_\_.

My best time for routine is \_\_\_\_\_.

**Next steps:**

1. Schedule time to plan.
2. Complete this Action Guide
3. Reach out for assistance! [www.schedulewithlisa.com](http://www.schedulewithlisa.com)

**You are unique, so your planning strategy must also be unique. Relax into these ideas and find the structure that works best for you!**



*“You deserve the opportunity to live the life of your dreams feeling in control, relaxed, and productive. You can achieve more, without working more.” – Lisa Crilley Mallis, Capacity Coach*