



# Strategic Planning

CHALLENGE | DAY 3

# Strategic Planning

## INSTRUCTIONS

One of the biggest challenges my clients struggle with is feeling like they don't have enough time to do the things they need to do, much less, the things they want to do...

Planning your daily activities and tasks is not glamorous, and probably not your idea of fun, but it will save you time and money AND play a huge role in the success of whatever goals and projects you are working on.

### **So let's see if we can find you some time...**

Before we get into the planning process, print three copies of the ***Weekly Calendar Worksheet***.

On the first copy, fill out a sample week to show how you CURRENTLY and regularly spend your time from when you get out of bed until your head hits the pillow in the evening.

I know your schedule will vary from week-to-week so don't waste time being too specific and trying to make it perfect—just get a general idea of your comings and goings.

Highlight or circle everything that you're doing that is in line with your core values and helping you reach your personal and professional goals.

Then use a different color or mark with an "X" to indicate everything that is wasted time or NOT helping you to reach your goals.

Now, take the 2nd Weekly Calendar Worksheet and fill in what an IDEAL week would look like for you.

IDEAL meaning if money and “reality” were not factors, if you had your way, what time would you get up in the mornings? How much time would you set aside for meals, workouts, spending time with friends and family? When it comes to work, would you set aside one day for marketing and admin, one for projects and only work with clients two or three days a week? Or clients in the mornings and admin in the afternoons?

This is YOUR ideal schedule, not anyone else’s. So don’t worry about what you “should” do, and don’t worry about being realistic. While we are on that topic, go ahead and write REALISTIC across the top of the third worksheet and set it aside. We’ll circle back around to that later.

For now just take a few minutes to enjoy the daydream of what type of schedule and routine would feel not just good, but delightful, maybe even magical!

### **Next, let’s do a Brain Dump:**

Take a blank piece of paper (or even better, tear open a paper grocery bag) and make a list of everything that you want or need to do in your life, whether it is personal or professional, daily, weekly, monthly, or certain times during the year.

The \*Jedi Mind Trick\* is that the torn grocery bag gives you permission to be super messy. There are no lines, rows or columns, there’s no filtering, just wide-open space for brainstorming, so go crazy and write anything and everything that crosses your mind. It sounds silly, but my clients who actually do this say it really does make a difference, and many have applied it to other areas of their business when they need a filter-free brainstorming session.

Make sure to include your day-to-day activities like dropping the kids at school, work meetings, planning your meals and grocery shopping, social and philanthropic activities, and don’t forget all the projects that you’ve been meaning to do... things like organizing your closet, updating your photo albums, painting your bathroom, cleaning out your inbox, etc.

Once you have completed your Brain Dump, it's time to filter and organize.

If you haven't already, print out one copy of the **Strategic Planning Worksheet**.

Spread the pages out where you can see all of them at the same time, then take each item from your Brain Dump and fill it in on one of those pages, based on where you think it is the best fit.

Don't worry - this doesn't have to be perfect - you can move this stuff around, and finesse and enhance things anytime.

Once you've moved everything from your Brain Dump to the Worksheets take a step away, go for a walk, take a nap, do a little dance or even just set it aside and come back to it the next day. That's OK too!

When you do come back, take a minute to review each list and see if there is anything that you can consolidate, cut back on, move to a different day, delegate or make more efficient? Then, if needed, prioritize the items on each page - especially the Project List.

Now, take the final **Weekly Calendar Worksheet** and fill in what a REALISTIC week would look like for you, based on your Strategic Plan, keeping your IDEAL schedule in mind, and starting with your Big Rocks.

If you haven't heard the Big Rocks story, here it is in a nutshell. If you have a large Mason jar, big rocks, small rocks, pebbles, sand, and water, what is the best way to fill the jar with the most items? If you fill it with water or sand first, you won't be able to fit any of the other items in. But if you put the big rocks first, then fill the spaces between with small rocks, you'll still have room to fill spaces with pebbles, which still leaves room for the sand, and then the water.

I recommend approaching/filling your schedule the same way:

1. Big Rocks - Block off all your "Non-negotiables"
2. Small Rocks - Block off time to complete all of the daily activities listed on your Strategic Planning Worksheets.
3. Pebbles - Block off time to complete all of your weekly activities.
4. Sand - Block off time for any monthly or seasonal activities, and/or projects that apply to this week.
5. Water - How you fill in any time that is left is up to you.

While you are being strategic about filling in all the cracks, you need to also give yourself plenty of room to breathe. Make sure to give yourself a buffer between time blocks and if in doubt, it is always better to overestimate how long it will take to do something.

If you can't fit everything in from your Strategic Plan, you'll need to go back to review your goals, priorities, and activities to see if there is anything that you can consolidate, cut back on, move to a different day, delegate or make more efficient.

Now that you have a strategic plan and a realistic schedule for getting everything done, the next step will be to put that plan into action!

In the meantime put all of the worksheets in a notebook or folder where you can get to them easily, because this will be a living and breathing document that will grow and change as you grow and change, and you'll refer to them often.

## WEEKLY CALENDAR WORKSHEET

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
5:00							
5:30							
6:00							
6:30							
7:00							
7:30							
8:00							
8:30							
9:00							
9:30							
10:00							
10:30							
11:00							
11:30							
12:00							
12:30							
1:00							
1:30							
2:00							
2:30							
3:00							
3:30							
4:00							
4:30							
5:00							
5:30							
6:00							
6:30							
7:00							
7:30							
8:00							
8:30							
9:00							
9:30							
10:00							
10:30							

# Strategic Planning

## TIME MANAGEMENT WORKSHEET

### Daily Worksheet:

**Step 1:** List all the tasks/activities that need to be completed every (or most) day(s):

**Step 2:** Organize the tasks/activities by priority or in the order they will (usually) be completed.

### Daily - Weekdays:

- Preview Today
- 
- 
- 
- 
- 
- 
- 
- 
- Review Today/Preview Tomorrow

### Daily - Weekends:

- Preview Today
- 
- 
- 
- 
- 
- 
- 
- 
- Review Today/Preview Upcoming Week

**Weekly:**

**Step 1:** List all the tasks/activities that need to be completed weekly (or bi-weekly):

**Step 2:** Assign each task/activity to the day that you are most likely to accomplish it. It is OK if some days have NO tasks and other days have several!

- Mondays
  - Daily Tasks
  - 
  -
- Tuesdays
  - Daily Tasks
  - 
  -
- Wednesdays
  - Daily Tasks
  - 
  -
- Thursdays
  - Daily Tasks
  - 
  -
- Fridays
  - Daily Tasks
  - 
  -
- Saturdays
  - Daily Tasks
  - 
  -
- Sundays
  - Daily Tasks
  - 
  -



**Monthly:**

**Step 1:** List all the tasks/activities that need to be completed monthly:

**Step 2:** Assign each task to a specific week.

Specific day of the Month (i.e, 1st of every month, 15th of every month, etc)

- 
- 
- 
- 
- 1st Week of the Month
  - 
  - 
  - 
  -
- 2nd Week of the Month
  - 
  - 
  - 
  -
- 3rd Week of the Month
  - 
  - 
  - 
  -
- 4th Week of the Month
  - 
  - 
  -

**Seasonal/Annual:**

**Step 1:** List all the tasks/activities that need to be completed seasonally or annually:

**Step 2:** Assign each task to a specific month.

Jan	Feb	Mar
Implementing: January Promoting: February Planning: March	Implementing: February Promoting: March Planning: April	Implementing: March Promoting: April Planning: May
Apr	May	June
Implementing: April Promoting: May Planning: June	Implementing: May Promoting: June Planning: July	Implementing: June Promoting: July Planning: August
July	Aug	Sept
Implementing: July Promoting: August Planning: September	Implementing: August Promoting: September Planning: October	Implementing: October Promoting: November Planning: December
Oct	Nov	Dec
Implementing: October Promoting: November Planning: December	Implementing: November Promoting: December Planning: January	Implementing: December Promoting: January Planning: February

**Project List:**

**Step 1:** List all the projects on your to-do list and the estimated time it will take to complete the project. (*i.e.: Clean out and shred old paper files - 4 hours*)

- 
- 
- 
- 
- 
- 
- 
- 
- 
- 

**Step 2:** List the first 3 projects that are the highest priority for you to knock off your list. If you are having trouble prioritizing, choose either the ones that will take the shortest amount of time to complete, or the longest - depending on which will feel the best to you! Then block time for these on your calendar. When they are complete, choose your next 3 projects off the list.

- 
- 
-