

Using a Weekly Format

Weekly gives a better view of how you allocate your time and offers more flexibility. You can make changes and adjustment much easier over daily planning.

If your current system uses daily but you love it, no problem. You can use the weekly format sheet included at the end of this book.

Don't throw out your daily planning pages. I'll show you a more productive and effective way to use them.

Organizing Your Calendar

"Terri lets organize your calendar.

Add all standing/recurring appointments for the next 6 months to your calendar.

Use Pencil

For example: You belong to your local chamber of commerce and they hold monthly luncheon every fourth Wednesday of the month. Go through your calendar and schedule the luncheon for all the next 6 months.

Make sure you add all your Big Picture Weekly/Monthly Forecast planning days too."

"Ann why 6 months, don't you want me to do the whole year?"

"You can do the whole year, but from personal experience, usually things can change in 6 months. Usually I do six months out. When I do my quarterly forecasting, I add appointments for next 3 months out.

You can add an event much further out, especially something like a wedding or birthday.

Once again Terri, **Always use pencil so you can erase and make adjustments if needed.**"

Auto-Prioritizing Your Day

"Okay Terri, got that done?"

"Yes, calendar all up to date for the next 6 months. What next?"

“Remember those daily sheets in your planner? How would you like it if those sheets automatically prioritized your activities for high to low? No more 1, 2 ,3 or A, B, C.”

“Ann I’m lucky if items make it on my to do list and get crossed off. Who has time to sit and put them in order?”

“You will love this trick. A correctly compiled “To Do List” should reflect the actual activity steps for the task(s) you blocked out time for on that day.

I like to refer to it as **Daily Achievement List**.

We will take your system daily planning page and turn them into your Daily Achievement Pages.

At the Top of Your Daily Page, Write MMA and highlight it using a green highlighter.

Leave about four lines blank and on the 5th line write Activity Steps and highlight it using a blue highlighter.

Starting at the Bottom, leave 10 blank spaces and above it write Stuff and highlight it using a yellow highlighter.

The most important activities... MMA activities are first. Activities to meet your objects, finish projects etc. are now second. The low producing activities. Stuff... last.

You just add your activities into those sections and it prioritizes without you thinking about it

I started out using Franklin Covey and ended up creating my own Daily Achievement Pages. I included a sample with your success sheets that you can use as a guide.”

Mon - 5 R&R Day <input type="checkbox"/> Today I am Grateful for: <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">MMA</div> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">ACTION STEPS</div> <hr/> <hr/> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">STUFF</div> <hr/> <hr/>	Tues - 6 R&R Day <input type="checkbox"/> Today I am Grateful for: <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">MMA</div> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">ACTION STEPS</div> <hr/> <hr/> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">STUFF</div> <hr/> <hr/>
Wed - 7 R&R Day <input type="checkbox"/> Today I am Grateful for: <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">MMA</div> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">ACTION STEPS</div> <hr/> <hr/> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">STUFF</div> <hr/> <hr/>	Thur - 8 R&R Day <input type="checkbox"/> Today I am Grateful for: <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">MMA</div> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">ACTION STEPS</div> <hr/> <hr/> <hr/> <hr/> <div style="background-color: #d9ead3; text-align: center; padding: 2px;">STUFF</div> <hr/> <hr/>

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“Very interesting Ann”

“Take you daily pages for the next week and give it try.”

“

Step Three – Fill in the Blanks

You will need your weekly pages, daily achievement pages and R&R, MMA and Stuff Activities Success Sheets

You use your Daily Achievement Page (daily planning pages) to write the detailed activity steps planned for your blocked time slots.

Always use Pencil

“Ready Terri to fill in the blank blocked time slots with action steps?”

“Yes I am”

“We will follow the 12 steps you took in Forecasting Your Month for Success

1. R&R Day...

What do you want to do? Something for yourself, your family, lunch with friends, sleep in, golfing... look at some of the activities you wrote on your R&R sheet.

You said the 14th is your R&R day. Go to your Daily Achievement Page for that date and write what you want to do...

2. MMA Day...

Ideal your MMA day should be nothing but building relationships...**The Ultimate Money Making Activity.**

You picked the 5th. Go to your Daily Achievement Page for that date and write down the names of who want to build relationships. Perhaps your going to do follow up calls with some of your clients just to say hi, maybe do lunch or coffee with others, send thank you cards and attend a networking event.

If you can't fit all details, phone numbers etc. on your Daily Achievement Page, write Ticker File. Put everything you need for that day and file behind that date.

3. Business Stuff Days for Successful MMA Day

These are the days before your MMA day. For you that means the 4th and 6th for this month.

What do you think you'll need to prepare for that day? Phone numbers... cards... addresses, postage stamps, lunch reservations, directions to networking event?

Write it down on your Daily Achievement Pages.

4. Your Monthly Forecast Agenda Activity Steps

You decide what activities steps to put the time blocks for your Business, Personal and Family Objective.

Let's use the sample business objective of contacting 5 new J.V. Partners. You wrote your activity steps for this objective on your monthly agenda. You estimated it would take about five hours to complete those steps. One of the steps is to compose a letter. You estimated one hour for this task.

On your weekly planning sheet, you blocked an hour on Tuesday. You drew an arrow to dedicate that time block toward your monthly business objective.

Go to the corresponding Daily Achievement Page, Use the "Activity Step" section of the Page and write compose letter for JV.

Repeat this process for all your Objective activity steps:

Go to the corresponding Daily Achievement Page. Use the "Activity Step" section of the Page and write out the details of the activity step(s)

Note: For the Rest of the “Fill in Blanks” you will only put details for the next two weeks. A lot can happen over the four weeks... by focusing on adding all activities for only two weeks in advance you will make fewer adjustments.

5. Me Time

Plan the activities for this week and next week. Write out the details of the activity step(s) on Daily Achievement Page. Use the ‘Activity Step’ section of the Daily Page.

6. Daily MMA Time Block

During Step 1 – Identify, you wrote out your Money Making Activities on a sheet of paper. Plan the activities for this week and next week.

Terri, what MMA would you like to do?

“Ann one of my MMA is post 3 times a week on my blog.”

“Let’s say you decide to use the daily MMA blocks for Monday, Wednesday and Friday over the next two weeks to post to your blog.

Pick the corresponding Daily Achievement Page and in the MMA section write post to blog.

The above 6 steps create the breakthroughs and take you to higher levels of income and productivity while keeping your life balanced. They enable you to become proactive in your business and life. You will begin to keep clutter and chaos to a minimal.

These steps are critical to maximizing your activities effectively.

7. Dedicated Stuff days or Time Blocks

Terri, if created stuff time blocks for your personal activities like I did, go ahead and pick your activities for this week and next.

Pick the corresponding Daily Achievement Page and write your activities.”

A CLOCK BOOSTING TIP:

Doing Repetitive Activity Steps?

Create check list
Print and
Put in your Tickler File

“Terri...any questions?”

“Yes, I got a lot of things that need to get done. When do I do them and where do I put them?”

“What you did was ensure your high producing activities got prioritized for the month.

You should have open time blocks... fill in the blanks with other activity steps like stuff work, projects, customer fulfillment, and personal and family stuff activities.

You want to blog 3x a week for some of your Daily MMA. You need to compose your post. In your open time blocks, you’ll compose and edit your post. Do the same thing you did with your other time blocks. Write a ‘trigger word’ like compose post and draw an arrow for the time blocks and put the activity details on the Daily Achievement List.

Don't go filling all your times slots to capacity. When adding your activities you need to include some buffer time. It's so tempting to fill up all those time slots but that will keep you in the burn-out overwhelm mode.

Next week during your weekly forecast time, you fill in the blanks for the next open week and make any adjustments for the week you forecasted.”

Flexibility is the key to successful forecasting.

Don't over plan...allow for interruptions you can't control. Add a time buffer to your activities. Leave white spaces on your weekly sheets.

Guard your weekly forecasting time

Forecast consistently every week.

Weekly Format Sample

WEEK of March 15 - 21		Monday - 15	Tuesday - 16
Objectives for the Month			
1.1	FILE TIME SHEET		
2.1	REVIEW REPORTS		
3.1	PROVIDE RESOURCES		
4.1	MEET WITH MGMT		
5.1	CLARIFY SKILLS		
6.1			
Objective Activity Steps			
1.1	CREATE TIME SHEET		
	SEND OUT		
2.1	REVIEW REPORTS		
3.1			
4.1	MEET WITH MGMT		
5.1			
6.1			
Clarify Project			
1.1	CLARIFY		
2.1			
Notes & Ideas			

Daily Achievement Sample

Date: 5/16 - TUES R&R Day

Today I am Grateful for:

MMA

CONTACTING PROPERTY
 PARTIAL TO RENEWAL
 ALL DONE

ACTION STEPS

TESTIMONIALS DE GON
 TAKE ON TOO MANY MORE
 MANAGE THE WORK
 WORKOUT

STUFF

TO DO LIST
 CHECK PROGRESS OF LIST
 PLAN FOR 2007-2008

Future Forecast Sessions

IMPORTANT: Keep your weekly forecasting appointments by making them high priority. It's very easy to schedule something else in that time slot. Resist the temptation to do other activities in your forecasting time block. Forecasting keeps everything together. It gives you flexibility to make intelligent decisions to effectively and easily get your work done.

Your monthly forecast planning lays the ground work and weekly forecasting and review "fills in the blanks" with details.

You make adjustments to your monthly forecast on a weekly basis. You have the ability to determine when you can take on other projects, if you join another committee etc.

"Terri I included a **Monthly Forecasting Checklist with your success sheets to help you plan future months. Look it over during the month to see what you need to prepare for next month.**"

"Thanks Ann. There is so much chaos, clutter, over commitments in my life right now. I think I may still have more activities than time. How am I suppose to squeeze all this in..."

“Terri, that’s traditional time management mentality... squeeze more stuff into your day.

How do you get rid of all the ‘stuff’ accumulated before you began to Thinking Outside the Clock?

Keep in Mind it took longer than a day for all this to happen so it won’t disappear overnight.

- First and foremost... The Monthly/Weekly Forecasting & Review time blocks are your best defense. Using them, you can put a halt to adding anymore self imposed overwhelm chaos and over commitments. Eventually, this will become the exception not the norm. Focus on the most important activities that need completed first.
- Ask yourself, what can I put on the back burner, what projects can I start later, what is not necessary right now, can your children scale back on their extracurricular activities and can you release yourself from any commitments?
- Use your Monthly Agenda to start getting yourself out from under Multiplicity of Stuff.
- And use the special emergency day.”

“What special emergency day Ann?”



My Notes – Thoughts – Questions – Ideas
