

*HOW TO*

**CREATE AND USE  
YOUR OWN  
PAPER  
PLANNING  
SYSTEM**

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*FPI FCLEX*

*A short but comprehensive guide on how to create a Planning  
System that serves YOUR needs.*



## **Introduction**

This is a brief workbook designed to allow the reader to design and develop his or her own paper planning system, or to allow them to develop a way to apply its content to a computerised system. The rationale behind the use of a paper system, how it is assembled and how it is best used are contained within its pages and I, as a dedicated and successful user of a paper planning system, encourage the reader to reconsider whether electronic systems provide for their needs as effectively as paper can, in a world where we are TOLD that computers provide all we need, yet we keep paper records, file paper records and rely on paper so much that we cannot overlook the simple fact that paper is here to stay and is the best way a person, an individual, can plan and record their lives – not just for ‘now’ but for the future.

## **Index**

Chapter 1 – Why a Paper Planning System

Chapter 2 - Creating YOUR Planner Diary

Chapter 3 - Preparing and Using YOUR Planning System

Bibliography

Appendix – Planning Forms you can use.

## Chapter 1

### Why a Paper Planning System

I would anticipate that all readers interested in this subject possess diaries. What I invariably notice, however, is that they are small, usually with a week-to-a-view, and therefore hardly any space within which to write meaningful entries. Credit for having a diary at all, demerit points for thinking that a week-to-a-page, free marketing diary is a good enough tool. The reality is that the amount of work, and more specifically the amount of individual tasks that we are expected to address requires a much more intricate, yet easily usable tool if we are to get the job done effectively.

Going back a step, some of you will undoubtedly possess a piece of paper (or ream of papers!) upon which you keep a detailed list of things to do. Sometimes that piece of paper is formally printed and has little boxes at the end of each line in which you can put a tick when the task is completed, but more often than not it'll be a bit of A4 with a list that is crossed out as time passes. And OH! the sense of satisfaction when the tick or crossing-off is carried out – more satisfying than just having done the task itself.

Well, shame on you for working in the 21<sup>st</sup> century with this supposed 'system' – and I use the word reluctantly, because systematic a To Do list is NOT. Such a list reflects what David Allen, author of *Getting Things Done*, calls a list of Next Actions, but the list does not reflect what MUST be done, what SHOULD be done and what COULD be done. The average list just identifies things that are to be done, without prioritising them or creating a sense of when they are to be completed. Consequently (and tell me I lie) there is a tendency to do the quickest, easiest or most personally rewarding things on the list – more often the former because more ticking off gets achieved and the ego is satisfied more frequently. And all the time, important stuff gets left out because it appears so BIG. This is better than nothing – but not much.

Next, I attack those with the small 'free' Diary obtained from a market stall, from work, or some other organisation or event. Such a diary is usually a 5-inch tall booklet with one, or even two weeks on a view. That's rarely enough room to put one appointment in it for a day, let alone to organise an individual's work and personal time. You have a diary that you can use, but this one isn't even big enough to include room for a To-Do List. Spot the paradox – you

have a time management tool that is not good enough to manage your time! A blunt chisel, a bit-less drill, or a glass hammer, in effect.



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Some readers have moved on a bit, and have a pocket sized Filofax or similar – more room for their To-Do list forms, but *I bet* the diary is still the week (or two) to a view.



© Filofax

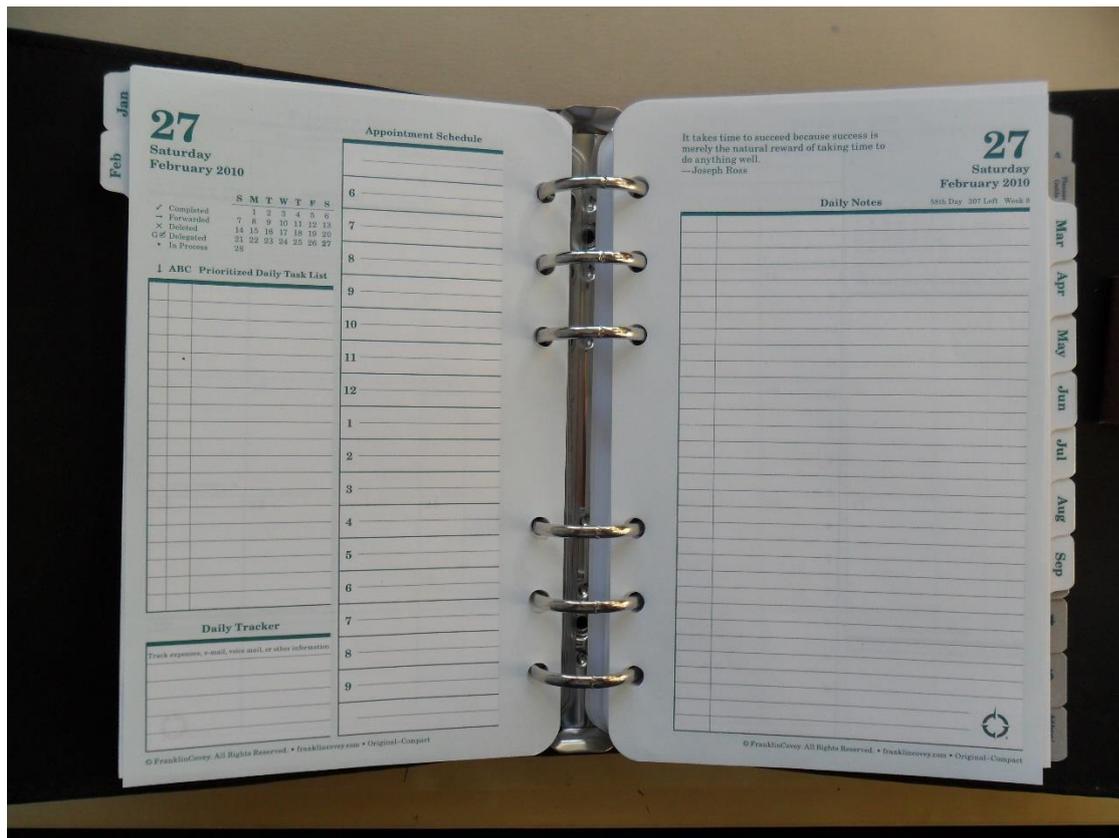
This means that you possess a tool that is useful to you, and which you find moderately effective. You may think that this is the epitome of personal effectiveness. But it isn't.

It isn't the best because;

- You only use the diary and lists for work, and have a different set for home; or
- You don't have a separate one for home and use the little diary for both, and find there isn't enough space; so
- You have to carry more than one item around with you, because you deal with 'home' stuff when you are at work and 'work' stuff when you are at home. (Much as you might wish or think you don't.)
- The lists include administration, operation, development and other miscellanea all on the same page, so you need to hunt for 'stuff' when reminding yourself what you have to do, so
- There is no sense of 'connectedness' in what things could be done in groups, e.g. telephone calls.
- It has been designed *for* you, but not for *you*, if you see what I mean. It's a designer's best guess as to what their potential customers want, but doesn't quite suit *your* needs fully.

It is an improvement when the Diary and To Do Lists can be kept in much the same place, but even that doesn't quite go far enough.

The answer is: The Personal Planner! (I could use the term Filofax. This word, a brand name, is now frequently used as the generic term for a Planner or Personal Organiser, so I use it here just to ensure that you know what I mean.)



Now, I am aware that the possession of a personal planner brings back memories of ‘Del Boy’ Trotter holding onto his Filofax as he fell through the wine bar flap in *Only Fools and Horses*, and recollections of Yuppies from the 1980s. Unfortunately, the disdain with which successful people were held at that time (deriding success being a solely British character trait), meant that mere possession of an organiser resulted in canteen culture derision.

*Don't set out your own stall based on 30 year-old prejudices! Read on, and acknowledge the benefits of having such a tool at your fingertips.*

A Planner is more than either a diary or a to-do list. It is both, and so much more. It is:

- A diary within which you have space to make appointments.
- A place to make *daily* or *weekly* to-do lists.
- A place to store information and data specific to your various roles.
- A place to keep records of contacts, work done, and references as to where relevant documentation can be found.

- A place to keep personal material, such as your personal or organisational Mission document, role descriptions, and values and goals for both your personal and professional life.
- And a place to make notes in respect of which later plans can be developed *in the planner*.
- Professional looking!

Taking each purpose of a Planner in turn, a Planner is

- *A diary within which you have space to make appointments.* Personal and work appointments and tasks, general management meetings, briefings and training courses all involve the making and keeping of appointments. And each of those events requires preparation and each invariably leads to the creation and execution of other tasks, tasks that must be planned and executed in their own turn. The 21<sup>st</sup> century individual *cannot* carry out their work without being able to manage how they use their time, and the use of appointments – specific time when things are done – is a valuable self-management technique. And by that, I include appointments with *you*. You wouldn't fail to keep an appointment with someone else – why not make some with yourself?
- *A place to make and store daily, weekly or monthly to-do lists.* To do lists still have their place. But imagine keeping such a list in a more ordered fashion? Better still, instead of having one generic, everything fits here list, why not have one where you can choose what day you want to do it, and just put it on that specific day's activity list? Or possessing a list that is role or project specific, to which you can refer as and when that project is to mind and something can be done about it?
- *A place to store information and data specific to your various roles.* Putting a to do list in a part of a planner dedicated to the storage of information pertinent to a particular role is a great idea, but keeping the relevant information in that same part of the planner raises your effectiveness tremendously.
- *To keep records of contacts, work done, and references as to where relevant documentation can be found.* Keeping all contacts pertinent to a particular role or project makes finding

those contacts easier. But adding a *list* of the contacts you had with these people, with brief details of what was discussed, has its advantages.

- *A place to keep personal material, such as your personal or organisational Mission document, role descriptions, and values and goals for both your personal and professional life.* This has value because now and then it is good idea to reconnect with what you are doing and why you want to do it.
- *And a place to make notes in respect of which later plans can be developed in the planner.* Why carry a notebook when you can put things straight into a planner? If I have a notebook I *could* write in it ‘Made appointment for 2pm Friday 12<sup>th</sup> July with Jim.’ – then hope I remember to put that note into my diary later. Alternatively, if I have the planner to hand I can go to the page with the 12<sup>th</sup> of July on it and write the appointment straight in. And I can do other things at the same time to make the appointment’s purpose more likely to be successfully achieved. Like plan for paper preparation, travelling, and so on.

I’ll make it clearer how this whole system works as this chapter and the next develop. For now, I’ll focus a little on your inevitable concerns and possible objections.

1. Planners are expensive.

They can be. Personally, I think the investment is reasonable, but even I baulk at some of the prices. I would suggest that a starter pack (including pretty much everything you need to get going) can be obtained for as little as £25 for a small planner, to as much as £150 for a big, leather-bound, A4 monster of an organiser. But if you have a half-decent four-ring binder (e.g. provided by the job or from a sponsor on a seminar or course), and the ability to use any decent word processor or desktop publishing programme, then *you can design your own!* Shock initiative! I designed the pages shown in the next chapter based on what I have seen available elsewhere. As I was designing them it occurred to me that by using this DIY method I could create forms and papers that suited my particular situation, while the providers of planning systems could only really produce what they foresee most people would find useful. More on that later.

2. Planners are for posers.

As I alluded to earlier, the fact that Yuppies carried them in the early 1980s was construed as posturing by the wealthy, and that perception can therefore reasonably be stated to have been jealousy on the part of those who hadn't thought of it first, and of those who were distressed that they did not have enough stuff to put into one. That's changed – we ALL have an enormous amount of 'stuff' going on in these times, and *everyone* should be organised. (Even my wife needs a planner, and she works part-time as a dinner lady.) In fact, I would now suggest that the people who rebel against the idea of being organised and effective are the posers, now – posing as rebellious because that brings social standing amongst those obsessed with the Personality Ethic! Here's my final argument in this regard - the 'posers' with planners are usually 'suffering' from the success that *you* want! (Point made, I hope.) Anyway, aren't iPads for posers, too?

3. They take up space.

So does stress. Stress takes up space in your head, and so does trying to keep track of things purely in your brain. The beauty of having a system is that the space in the brain can be freed up from having to remember things. Some high quality systems (pocket sized or compact being the accepted terms for smaller planners) will fit into a pocket. The biggest will fit into a briefcase, or can go (if you take the idea that you can create a DIY system) into a zipped closure A4 conference folder with a 4-ring system. The smaller ones are easier to carry, I grant you, but your personal circumstances may dictate the size you use. I have had the 'that's too big to carry around' argument, which I counter thus – most of us drive to work or carry a rucksack if we go by train or walk. So - the drivers have to carry it from the car to the office and the 'rucksackers' may have an extra pound or two to put on the train floor. The rest of you can buy a small one. I am not suggesting you even want to carry them everywhere, but I am saying that your lifestyle will probably not suffer if you think about the process in advance. Size is not an excuse to avoid owning an effective lifesaving tool!

4. I need a Planner for work and a Planner for home.

No, NO, **NO!** The first rule of successful time management is you only EVER possess ONE Planning System. It is foolish to keep more than one diary because of the potential

for conflicts between what one says and what the other contains. Remember – you are not a Staff Member at one point in time, and a Family Member in another. You are BOTH, ALL of the time. The only separation is time-related and situationally-specific. Particularly now we all have mobile telephones: I have never answered the phone and said, “David Palmer here. I am in Family Man mode, sub-tasking as father, chauffeur at the moment. Please call back when I am in Writer mode, sub-tasking at chapter editing.” Have you? I suspect not. So having ONE planner to hand prevents me making promises in a professional sense that I am unable to keep because I have already made a family commitment I can’t change, and vice versa. (A colleague once showed me her *three* diaries. One small, two-weeks to a view: an A5 week to a view: and an A4 day to a page. She swore she’s never made that mistake. She lied.)

5. Paper is old hat, computers are new.

Funnily enough, despite the truth in that comment, I am surrounded at work and at home by pieces of computer-generated paper. Yes, reader, despite the availability and indeed practical potential of computers, we still live in a world where most record-keeping, written communication, planning and doodling is initiated or concluded on paper. For me, the benefit of having a paper (in my case an A4) system is that in the event I have a meeting, event, appointment, planning operation etc., I can put relevant papers into the relevant section or even date in my planner so it is there when I need it.

I hope you’ll agree that the case for having an organiser is made out, even if you have decided that you don’t want one. It is still a matter of personal choice. The choice is whether to be organised and stress-free, or not. Having decided you want one -correction - need one, how do you go about buying, or even making one? Read on.

## Chapter 2

### Creating YOUR Planner Diary

The advice contained in this section is based upon my own experiences with the better quality planning systems available on the open market. There is no obligation that you follow this advice, but I would like to use a driving analogy in explaining why you should.

When you learn to drive a car, you are taught the absolute basics, to pass the test. In time, you develop good or bad habits. For the enthusiast there is a next level, where you are taught the basics of advanced driving. (It grieves me that people are given this free tuition and then lapse back into lazy driving.) Then there is another level towards which you can aim (the High Performance Course) if you want. Or you can just ‘get from A to B safely’. It’s up to you.

For my part I always try to aim for the best because the best is the best for a reason. With a planning system, I intend to identify here what I think is ‘best’, and I advise you to follow it as well as you can – but you are not obliged to do so!

In this section I will explain the core components of a Paper Planning System so that, using this information, you can start to assemble your own.

#### *A Binder*

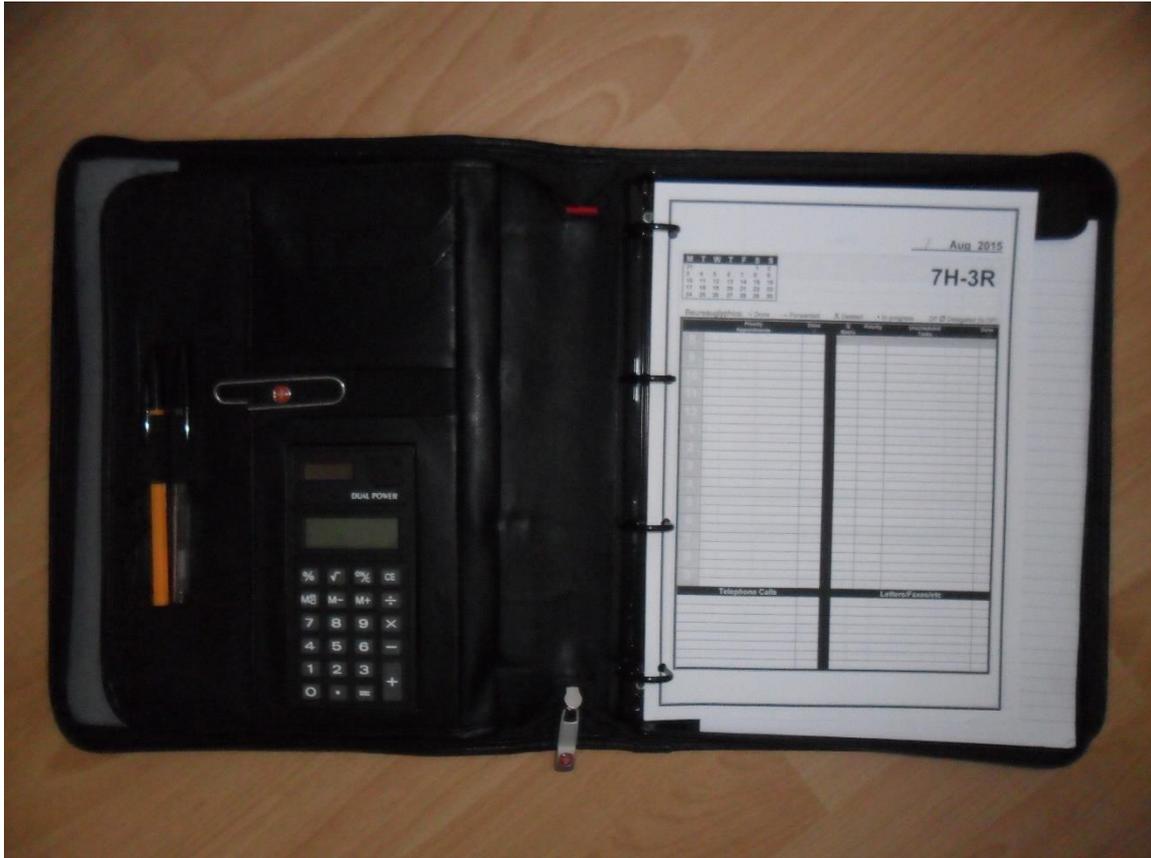
Regardless of the size of your system you will have to put it in something! If you buy your system from one of the major companies providing such products, a binder that fits the page type will normally be available. Beware the problems that can be caused by buying carelessly. The two popular A5 (and smaller) systems can use 6-ring or 7-ring binders, and this means that you have to choose company-provided paper unless you also buy a suitable punch. And, of course, 7-hole paper won’t fit a 6-ring binder and vice versa. The same applies to larger binders, where a US folder would be 7-ring while a UK binder would (more than likely) have only 4.

Incidentally, US paper sizes and UK paper sizes differ. A4 and A5 have US equivalents but they are different – wider, taller, narrower or shorter depending on what you buy.

Back to products: if you buy a pre-designed planning system, you would expect to be able to buy a binder with it, or at least have options for binders available from the same provider. Binders are expensive, particularly those that contain A5 or A4 paper. Leather and vinyl are the preferred materials, and the inner of a binder can also be a consideration when making your selection.

Your selection must take into account the extent of your intended use for the kit. If you intend to keep credit cards with your planner, you can either buy a binder with suitable slots or (instead) choose to buy a plastic page to fit the rings, in which the same cards can be stored. (I would not recommend keeping your cards in your planner but your situation may make it safe to do so.) Pen slots are a bonus and some can keep two pens – or a pen and a pencil (see *post*).

If you, like me, are considering the construction of your own system, the chances are that you will find a cost-effective conference-style folder with the 4-ring mechanism included. Again, the amount and type of storage space in this folder can be changeable. Some can be very basic and just contain a ring mechanism and one sleeve for loose paper. Ring sizes can vary, too, and this size dictates the amount of paper you can store – the bigger the ring the more paper you can keep in the binder, but the bulkier it gets. Some also have a facility to include an A4 or A5 pad. For my part, I use a Wenger zipped binder that has large rings, a number of various-size slots, a calculator and pen loops – all for less than £30.



(Photo for illustration purposes only)

DON'T buy a binder for pose value – in this world you need to get one that is durable!

By the way, there is another kind of binder, which does not contain a ring-system but allows for the insertion of wire-bound planners. These planners are designed around each month having a book of pages, and you change the book in a suitable cover, every month. This book is supported by a second book containing a booklet of month-at-a-view pages for longer term planning.



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### *Paper Size*

Sizes vary from very small (A6, about 10cm by 7cm) to A4 (29cm by 14cm *approx.*). Readers may be familiar with the proverbial Filofax size, which is tall and narrow, like the average diary. Size does matter, because the bigger the page the easier it is to use and the smaller the page the less information you can put into it. Size can also be dictated by where you intend to keep it – handbag or briefcase, for example. In my view, ‘Filofax’ size is the MINIMUM for an effective system BUT you need a ‘day to a page’, at least. Smaller spaces mean less effective usage.



© Filofax

The advantages of A5 and A4 paper are obvious – you can buy those sizes easily, without necessarily having to spend too much money. US-sized paper is specialist (in the UK, of course) and you have to buy it from the providers of the system, which can be expensive (although the quality is usually better than commercially available, cheap blank A4 paper). In addition, using A4 (in particular) and A5 means that you can use your own computer and word processing programmes to create your own forms. Another bonus is that the UK document system pretty much relies on A4 paper for EVERYTHING, so documents sent to you or generated by you will usually be in that size. This means that if you are using an A4 system, all the paper you get will fit your binder if you want to carry it with you, and plastic sleeves will also be easily obtained to fit the binder. Finally, for the wealthy, Filofax make some specific accessories that fit the A4 4-ring system, i.e. CD holders, ruler/page markers, business card holders, and Post-It Note holders.

### *Diary Pages*

Diary pages can come in monthly, weekly and daily formats. This is an important element of the system and needs more explanation. The best diary, I am sure you'd agree, contains enough room to put in anything you think of you may need. Appointments are the obvious, and this means a list of timed segments should appear on the page, something like this:

8	
9	
10	
11	
12	
1	
2	
3	
4	
5	
6	
7	
8	

But is that good enough for our purposes? Of course not, we also want a space in which to list our Things to Do, like this:



Can it be improved upon? How about a separate space for telephone calls and other communication records?

<b>Telephone Calls</b>		<b>Letters/Faxes/etc</b>	

Put them together, and what have you got?

Appointments		Q Matrix	Priority	Unscheduled Tasks	Dose ↓
8				<b>Work Planning</b>	
9					
10					
11					
12					
1					
2					
3					
4					
5					
6				<b>Home Planning</b>	
7					
8					
9					
<b>Telephone Calls</b>				<b>Letters/Faxes/etc</b>	

Now *THAT* is a Diary Page!

You will note that there is no room for keeping a diary of events, given that the page just allows for appointments and tasks, but this is catered for in this example through the second page that is viewed on opening your binder, which looks like this:







And finally, so that you can list important events for future reference, this Index page:

INDEX

Month \_\_\_\_\_ Year \_\_\_\_\_

Date	Event	Date	Event
1.		22.	
2.		23.	
3.		24.	
4.		25.	
5.		26.	
6.		27.	
7.		28.	
8.		29.	
9.		30.	
10.		31.	
11.		Additional Journal Notes	
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			
21.			

Now, how to use it.

## Chapter 3

### Preparing and Using YOUR Planning System

The following pages describe how to use pages and forms within a system that suits your purposes.

(Note: as indicated earlier, if you have the capacity to use word processing software to a reasonably high degree, YOU can design your own pages to suit your purposes. And even if you design in A4 size, you can still utilise print managers to print the page in smaller sizes, like A5. Additionally, YOU can decide which page to have on the left and right of your diary 'view', and as such a left-handed person may prefer the DIY planning system rather than a bought one. I designed the pages illustrated above to suit me, and even had another page designed for when I was on a diet in which I recorded my weight and daily food intake!

#### *Priming the System*

Organising the content of the binder is the next consideration. Planning systems I have used contain:

1. Diary pages.
2. Section dividers in various styles.
3. A Reference or Data section.
4. Contact (address) information

Taken in turn:

1. *Diary pages.*

If, like me, you like a Daily planning system, you would find it difficult to carry 365 pages of diary all the time. The planner would be too bulky, and unnecessarily so. Common practice, therefore, is to carry only the current months daily pages (with an option to carry the previous and next months' pages if space permits or it is desirable), BUT to carry all 12 MONTH planning pages at the same time. This means that I can

plan tasks and appointments for months other than the current month, but not put them onto DAILY pages until that month comes about. Another common practice is to keep the MONTH diary page and a separate monthly TASK LIST so that appointments and unscheduled tasks can be kept separately. Finally, the Index page can be added so that you have a record of what happened on specific days. This way you only have to refer to the Index to see what happened months ago, rather than trying to find it from the 30-31 pages in the diary.

The standard product will have all these contained within its format. A WEEKLY planning system is less bulky, but there is obviously a space consequence. Fewer tasks can be put into a day because the appointments take up most of the space (usually), and there is no room for notes. That said, an imaginative user can insert notes pages into a loose leaf system. My advice – if your work/life is appointments based, use a weekly planner with space for some tasks; if you're a task orientated person, as most of us can be, use the daily planner with big to-do list availability!

## *2. Section dividers in various styles.*

Plastic or card are used to divide the sections, plastic coming with the more expensive systems BUT they can be bought separately and used in a binder with the right number of rings. For example, a Time/System costs well over £100, while a Filofax costs less than half that (binders extra), but Time/System's pages and dividers will fit a Filofax binder, and visa versa. Section dividers can be used to separate months, reference sections or role sections. Good systems come with pre-printed dividers covering sections such as Roles, Values, Goals and Instruction Manuals. Self-designed system can utilise month, numerical or letter (A-Z) dividers, can be bought cheaply at Staples or other stationers, and are readily available without a wait for delivery from a specialist.

## *3. A Reference or Data section.*

You can elect to use as few as 5 or as many as 12 dividers for a reference section – the choice can be yours. The reference section is usually made up of life or work areas, e.g. home, health, finance, and so on for life; management, projects, specific contacts, etc.

for work. There will be overlaps for a complete and practical system. But it's your choice what to put into it and how to use it.

#### 4. Contact (address) information.

Mobile phones have taken over a little from the need for a Contacts section, but phones are more likely to be lost or stolen than a planner, and some phones won't facilitate addresses. So, while this may not be the biggest part of a planning system, it can still be valuable, particularly if you choose to use it to keep contact *records* as well as addresses.

To summarise: a planning system needs a binder, and inside you would keep a Personal Data section, a Diary section, and a Reference section. This is the minimum, but some planners have even more sections and if you design your own you can add or delete sections as your needs dictate.

#### *Using the Paper System Effectively*

So you have all the parts – binder, diary, section dividers and paper to fit. Now you need to know how it works. I'll demonstrate by first taking you through the assembly process stage by stage.

1. Take your selected binder and put the section dividers into it.
2. Put the Monthly Diary and Task List under EACH monthly divider. You place the Master Monthly Diary and Task forms into each month's section so that you can plan a month's activities whether you have daily pages for that month, or not.
3. Put the DAILY pages for the CURRENT month under the relevant divider and BEHIND the Master Diary and Task form.

Stop, and admire what you have done so far. You have now assembled the most important part of a time planning tool that will greatly enhance your effectiveness, if used properly and

diligently. As this is the most important part, it is worth addressing how it is used, before going onto the assembly of the other sections.

*Using the Diary*

Logically, given that this is a time management book, let's start with the diary section.

We have agreed that we could not carry a whole year's diary pages, which of course means we don't have the facility put appointments into the precise date *of* that appointment if it is a few months away, or even next month. It doesn't matter, because we STILL have the Monthly Diary page for the relevant month. For example, it is now September 2014 and I have that month's pages in my binder. I have to make a court appointment for Jan 2<sup>nd</sup> 2015, at 2pm in the afternoon. So I enter it, thus:

**Monthly Planning Calendar      January      2015**

<i>Mon</i>	<i>Tue</i>	<i>Wed</i>	<i>Thu</i> <u>1</u>	<i>Fri</i> <u>2</u>	<i>Sat</i> <u>3</u>	<i>Sun</i> <u>4</u>
AM	AM	AM	AM	AM	AM	AM
PM	PM	PM	PM	PM 2pm    Crown Court	PM	PM

At this stage, the detail is not important. What is important is that now, if someone asks if I am free that day, I can look at it quickly and declare that I have a prior and unchangeable appointment.

What if I have a task that needs to be done in January, but which does not have to be done at a certain time? That's when I utilise the Monthly Master Task list, thus;

Monthly Master Task List      January      2015

<u>Business Tasks</u>			<u>Personal Tasks</u>		
	Arrange	Personal	Development		Arrange car MOT test.
	Review with Manager				
	Dismiss Fred *****				Pay credit card bills
	Jim ***** appointment				Personal development seminar notes
	Etc				Etc

The purpose is to have a central depository for appointments and tasks, a depository that does not require the carriage of reams of paper if it is to be effective. The aim is to ensure the proper recording and planning of future tasks, without the bulk.

At or towards the end of the current month, and before the next month starts, you take the time to create and make the necessary entries in the next month's Daily Pages. I tend to do that in the last week before the month changes, whereupon I may also file the early weeks of the current month to make space and then insert the first couple of the next month's pages, but this is an individual quirk and may not work for you.

It may be that you prepare or possess the whole year's pages in advance and can update them as you go along, at the end of a week, for example; if you buy a product from a planner company possession of all the pages will certainly be the case, and you will probably have a custom-made storage facility for that product. If you design your own system, the advantage is that your papers will file easily in A4 or A5 folders (or lever arch files) bought cheaply and locally, which means you can prepare and store Daily Pages in anticipation of need, and also file them by month after they've done their job.

*Additional Issues*

- Make forward planning appointments in pencil, because you can guarantee they will change.

- Keep the monthly pages in the binder for a while after the month to which they relate, for reference purposes – file them later than the daily pages. Of course, they are current for 12 months!

### *The Reference Section*

This section can be used for, well, anything that you want. If you are following the philosophy outlined in earlier chapters, you might choose to keep some sections of the planner for Role-related reference. That is, each section (and only space and need dictate whether you use 5, 10 or more dividers) will relate to a role you have. Indeed, this is the only idea that makes any sense if it is not to become unmanageable.

Under each role, you could keep a list of goals related to that role, ideally in the format discussed earlier. You could keep a list of contacts related to that role, and any pertinent reference materials. Any out-of-planner notes could be filed or re-recorded in this section. Another form you may find useful is the Activity Sheet/Actions Checklist.

## Actions Checklist

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Number	OK	Item/Task	Delegated	D	Due Date	Done Date
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						
14.						
15.						
16.						
17.						
18.						
19.						
20.						
21.						

An Activity Sheet can be used in conjunction with Roles and/or Goals. In either case it is merely a Catch-All List of role (goal) related actions that need to be completed, but which aren't necessarily date specific. It is in essence a brainstorming sheet upon which you can literally list things that have to be done, in no particular order and when they come to mind. It represents a fairly early part of the planning process and is really nothing more intricate than a To Do List upon which tasks can be listed, and then reference made to the list when the formal planning process takes place, e.g. weekly.

Either within the Reference Section, or elsewhere in the binder (ideally purpose-built) you'd be well advised to keep a blank pad. A5 and A4 systems are relatively cheap to supply, A4 being cheapest. Any other sizes usually mean buying a purpose-built notepad for that size, with a cost implication. That said, 6-ring ('Filofax' sized) binders are *fairly* consistent so some bargains can be found in stationers and discount shops that will do the job.

Returning to the matter in hand, once your roles have been addressed, other Reference Section compartments could include Vehicle Records, Financial Records, blank forms that may be used at short notice, memo pads – the possibilities are many and are only limited by your imagination and the availability of space. Among those I keep are Brainstorming Sheets – blank paper, in other words! (See *Appendices*)

The major thing to remember, though, is this: NONE OF THE PAGES ARE OF ANY USE UNLESS YOU USE THEM DILIGENTLY. Don't fill the binder up with papers you never need, but at the same time, don't fail to utilise the papers you have.

#### *Using the Planner for Planning and Time Management.*

You now possess a bound Planning System (PS) and already have some idea about how to use it. But in order to use it to maximum effect it is worth covering the planning process from the outset, and indeed from the perspective of having literally just put it together. So your first actions with the planner will to carry out the following activities:

1. Decide what your roles are: manager, project supervisor, family man, social secretary, father, mother, and personal development – whatever your roles are.

2. Decide what your goals are – all of them, as many as possible and as SMART as possible. List them in no particular order at this stage, just write them down as they come to mind.
3. Having made that list, now select the goals and mentally (or better still, in writing) put them under the role headings you just identified.
4. Now formalise the goals using the goals template and file them under the relevant role-related Reference sections.
5. Using the Activities List for each role or goal (as quantity indicates), write down all the actions you need to take, all the items you have to purchase, fabricate, obtain, all the people you need to contact and why – in other words, make a To Do list that is role-specific.
6. Use another Activities List for any tasks (etc.) that are not specifically related to goals, or which are just activities or potential goals in respect of which no detailed or purposeful action needs to be taken, but which may become more relevant or important in time.
7. Make sure that every Activities List is filed under the related Reference Section divider you allocated for the roles you selected. For example, if you have a goal regarding career development, you may place this Activities List under the ‘*Your Job Title*’ role divider/section.

Now you have a focussed reference point for everything you want to do that is of some importance to you. This is your comprehensive guide to your life plan. These are all the things you have decided you need to get done in order to get what you want.

This is not a problem because you now have somewhere that is organised enough for you to place a ‘sudden thought’-task into the right place to find it again when you are planning. Write any such idea down the second it comes to you, and it will never be lost.

*The next step – planning the Activities into your Diary for ACTION!*

Take a Monthly Planning page for the next month or three, and enter any activities that are date-specific into the relevant space. Dentist’s appointments, court appearances, family events and any other time-specific actions area entered here. Any *other* activities that you want to get

done in a specific month that are not to be done at an appointed time or on an appointed date, you now enter on to the Monthly Master Task sheet. Refer to your role-related and ‘spare’ Activities Lists as you carry out this plan. The idea is to make sure that anything and everything you need to do for the immediate (3-month) future are entered into the PS.

Having covered the next 90 or so days, the time has come for you to plan the tasks into the Daily Pages for this month. This is a key clutch moment. What do you want to get done, and when do you want to do it? The answer is in the Monthly Pages, to which you have referred and which you have already indicated contain the planned activities in un-prioritised, disorganised fashion.

First of all, enter the Appointments into the days upon which they are to be attended. Get these out of the way first because they are immovable and influence how much you can get done in the remainder of the day. Not just ‘work’ appointments – enter personal appointments, too. These important, urgent, and scheduled activities - and the surrounding preparation - will dictate how much time you have for the other things you want to get done.

Once the appointments are out of the way, look at the other unscheduled activities on the lists. Decide – “when do I want to do (whatever).....?” If you have a week in which to do the activity, choose a day when you think you’ll be best able to get it done, and enter the task into the Tasks section of the Daily Page for that day. That decision will be dictated by the other appointments, availability of resources (e.g. computers, cars, *other people*, and so on), what’s happening the next day, or what resulted or is anticipated to have resulted from the day before.

You probably could not do everything you planned into a particular day, but having a list of things you want to do on that day is more likely to get them *done* that day, or the next, than just having the list of To Dos. The entry of a task into the diary page implies urgency, but here’s the caveat – YOU decided to place some sense of urgency on it being done that day, not somebody or something else. If I just have a list of to-dos, then the whole list appears Urgent. If I take the Master List or Activities List and then take a conscious decision as to when I wanted it to be urgent (by selecting the day it was to be done) then it is I who had control, not the list. There’s the difference with a System. You run it, it doesn’t run you.

As you do this, your mind focuses on what else you may need to consider. For example,

suppose you have an appointment with someone at their location, next Wednesday at 11am. As you make the entry for Wednesday in the 11am 'slot', you consider that you'll have to be there before the appointment, so you plan travelling time into the schedule. Next, you recall that you will have to be ready for the interview, or whatever else needs to be done, so if there are any activities relating to the purpose of the appointment, you can plan those actions for the Monday so that they are done and you are ready, without panic, Wednesday morning. If you have a bank appointment, you can write down a task in the Tasks section of that page (or a previous day's page) to have the relevant papers and cards ready. If it's a meeting for a project, you can prepare the papers, reconsider what decisions have been and need to be made, and so on. *The idea of planning this way is not just to plan one thing – it's to raise awareness of the other things that need to be done in respect of that 'one thing'.* The system raises awareness while simultaneously reducing the amount of space taken up in your head to think about things, thus freeing your brain up for things that have to be focused on NOW.

Having made a plan here and there, awareness may also be raised that you need certain papers for the appointment. Now, suppose you only need one or two sheets of paper on that day for that appointment? With this system, and particularly in an A4 system, you can put them into the relevant Reference Section, or even into the Diary Page for that day. Immediately, the need to remember them (and find them) on that day is dealt with.

There is no obligation to put *everything* on your Activities and Goals lists into the planner the first time you build it. There may be goals or activities that can't be scheduled, now. They may be for a long time hence. But plan as much as you can reasonably expect to get done, allowing for emergencies and those days when you just want to rest. The rest stay on the master lists until next time you formally plan, or for when you have 5 minutes (waiting for something to happen) and can review what's possible.

When it comes to deciding what can go on one day's page, I have read of using the 150% Rule. With this concept, you plan what you think you can get done in a day, and then add half as much again. This can have the effect of making your paper look as though you're not as successful as you can be – tasks not crossed off – but only you read it, and you know the truth. But on a positive note, this idea also means that if you can't do Task A, then you can still consider Task B or Task C when the mood takes you or the opportunity arises.)

So, to recap:

1. Identify your Roles.
2. List your Goals.
3. Put the Goals under their respective Roles, being mindful of the separate list for Goals that don't necessarily come under specific Roles (e.g. whims).
4. List the things you need to do to get the Goals achieved, onto Activities Lists.
5. Schedule the Activities that are 'appointments' on the Monthly Planning Pages, and put the non-appointment Activities onto the Master Task Lists, for the next couple of months.
6. Put the current month's appointments onto the Daily Pages, considering ancillary tasks that need to be done as you do so.
7. Finally, start planning the non-appointment tasks into the Daily Pages on a day you want to get it done.

The only thing left to do now is to actually **DO** the things on the list when you decided they had to be done!

### *Additional Points*

If you look at the pages I've designed you will see headings like 'Q Matrix', 'Priority', and so on. These are specific time management techniques and terms which the reader would be advised to research in the books *First Things First* by Stephen Covey, and *TimePower* by Charles Hobbs. I use them in my planning as a matter of course but you might consider the depth of thinking behind them to be unnecessary in your situation. Therefore I have elected not to explain them in *this* book.

### *Electronic Planners/Tablets/Computers/Smartphones*

These can be just as effective as paper planners, but consider the following advantages and disadvantages.

### *Advantages*

1. Size. Pocket computers and phones tend to be easy to carry. Laptops not so.
2. Pose value. They can be very attractive and do, undeniably, infer a certain social status on the holder.
3. Connectivity. Some quality models provide telephony services and internet access. And some telephones have organiser software, e.g. Blackberry and iPhone.
4. They can contain games - which could also be a disadvantage.
5. The better ones (Smartphones) come with popular word-processing software and email/internet facilities, and as such act as 'pocket PCs' as well as planners.

### *Disadvantages*

1. Screen size. A handheld computer's screen can be quite small, depending on the model.
2. Batteries. These go flat.
3. Attraction. They are more prone to thefts.
4. Integrity. If you drop it, a paper planner goes 'Thud' while a palmtop/phone goes 'crunch'.
5. Memory. They can contain a lot but once they're full, if you don't have a separate card or storage facility you may need to lose stuff.
6. Any diary contained within tends to be fairly basic and is rarely adaptable to suit an individual's needs – it is usually a Diary and To Do list. But .....

If you intend to use an electronic planner, I would make the following suggestions.

- Do get one that has all the word processing and software that is compatible with whatever other systems you use.
- Do not rely on the contact and planning software provided UNLESS you are very familiar with it, and can perhaps adapt it to suit.
- If available, buy a software package that will allow you to use the electronic system in the same way that a paper system can be used.
- Back EVERYTHING up as often as reasonably possible.
- Look after it!

Any advice given in this chapter on diary management can easily be utilised by a reader who uses an electronic system (or both).

## **Recommended Reading**

There are only two books I have ever read that effectively describe how to use a planner, and a third which has some interesting ideas in it.

TimePower by Charles C Hobbs is an excellent reinforcement and expansion on this 'idiots guide'.

First Things First by Dr Stephen R Covey is an expansion on the philosophies of time management, as well as a guide on how to use a planner.

The Advanced Day Planner User's Guide by Hyrum W Smith provides some useful insights on using planners and is well worth a look.



**Contacts List**

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<i>Name</i>	<i>Address</i>	<i>Telephone</i>
		<i>Fax</i>
		<i>Mobile</i>
		<i>E-mail</i>
<i>Name</i>	<i>Address</i>	<i>Telephone</i>
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		<i>Fax</i>
		<i>Mobile</i>
		<i>E-mail</i>

Contacts List

## EXERCISE / DIET SHEET

Week ending: \_\_\_\_\_

<i>Meal Record</i>							
	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Start Weight:							
Breakfast							
Lunch							
Evening							

Exercise	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Run	Dist/Time						
Weights							
Stretching							
Other							

Diet and Exercise Record

## Goals Sheet

<b>Goal</b>		
<i>Specific: Measurable: Achievable: Relevant: Timed:</i>		
<b>Reason for Goal (Outcomes)</b>		
<i>Why I want to achieve this goal: What interim and consequential benefits I will gain: 4 Human Needs and Endowments:</i>		
<b>Actions</b>		
No	Action	Deadline
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
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31.		





## SIGNIFICANT DATES

January		February	
March		April	
May		June	
July		August	
September		October	
November		December	

Significant Dates Sheet (e.g. annual events such as birthdays)



Week \_\_\_\_\_ to \_\_\_\_\_ 2015

Mon	Tue	Wed
08.00	08.00	08.00
09.00	09.00	09.00
10.00	10.00	10.00
11.00	11.00	11.00
12.00	12.00	12.00
13.00	13.00	13.00
14.00	14.00	14.00
15.00	15.00	15.00
16.00	16.00	16.00
17.00	17.00	17.00
18.00	18.00	18.00
19.00	19.00	19.00
Thu	Fri	Sat
08.00	08.00	AM
09.00	09.00	
10.00	10.00	
11.00	11.00	
12.00	12.00	PM
13.00	13.00	
14.00	14.00	
15.00	15.00	
16.00	16.00	Sun
17.00	17.00	AM
18.00	18.00	
19.00	19.00	
Priorities for the Week		
		PM

Generic Weekly Page for the 'appointment' worker

