

# Fantastic Systems

TASK AND TIME MANAGEMENT TEMPLATES

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## **A system helps you focus on doing what matters. It keeps you proactive, instead of reactive.**

By having this as a regular part of your life, then you have a regular check in with your tasks and goals. And you can course correct at good, regular intervals (which is critical).

This workbooks contains the templates I use for my weekly review time, my weekly planning, and my daily planning.

The weekly review and plan take about 30 minutes each, and I usually do them on Sunday afternoons. The daily planning takes about 5 minutes and I usually do it the evening before my day.

First, let's quickly review why these activities matter. Then, the templates themselves are available at the end of the document. Feel free to print out the templates and use them or create your own.

### **The Monthly Habit Tracker**

This is a new addition to my analog notebook and it is one that I have quickly fallen in love with. It is a combination of a one-line journal plus daily habit tracker.

For each day of the month, there is space for a single line of text. Use this to record anything you'd like something you are grateful for; one thing you learned that day; one thing you accomplished; the highlight of your day; etc...

And in the space next to the one line are boxes for you to track up to six habits. I chose six to correspond with the six areas of your life: Vocation, Relationships, Rest & Recreation, Finances, Physical Health, and Spiritual. You don't need to track six habits, you could track just one or two. Nor do you need to track a different habit for each different area of your life. It's all up to you.

## The Monthly Plan

Two valuable things to ask yourself at the beginning of each month are:

1. **What is my definition of success for this month?**

*(Put another way: What are my goals? What are my desired outcomes?)*

2. **How will I accomplish those outcomes?**

*(Put another way: What do I need in order to make it happen?)*

As you move through your day-to-day life, you may, at times, feel as if you are just going from thing to thing — being pulled from one urgent issue to the next. Thus, by knowing your definition of success for the month and knowing how you will accomplish it, you will find that it is much easier to gauge if you are on track or if you need to adjust how you are spending your time.

Another advantage to defining success for your month is that it brings about focus. It's a focus which will empower you to say "no" to all the other ideas and opportunities that come my your way — both from within and without — and thus to stay focused on the most important goals you have set for yourself.

## The Weekly Review

This is your chance to celebrate progress. Your chance to course correct. And it's a way for you to stay on top of all your tasks, goals, and other projects.

A regular review time is a vital component to trusting your system. With this hour as part of your weekly routine, you can rest assured there will be a time and place for you to check in on where you're at.

In his book, David Allen advocates that your weekly review time be spent getting clear, current, and creative.

- Getting clear means you clean up the mess of paper, inboxes, etc.
- Getting current means you review everything past and upcoming from tasks to events.
- Getting creative means you think, and brainstorm, and plan.

## **The Weekly Plan**

The weekly plan is your chance to focus in on what you want to do this week. It's your chance to see what will be happening in life over the next seven days, and ensure that you are prepared for it.

With a weekly plan, you can be proactive about reserving time for the things that matter to you. It is in this hour that you take ownership of your week.

I also love having a plan for certain things (such as which days I'll do cardio and which days I'll do strength). By making these decisions ahead of time, it makes it easier to follow through when the time comes and I am enabled to focus more freely on doing the things that matter. If you remember from the session about The Note, this is the very same principle just applied to your whole week.

## **The Daily Plan**

Starting out your day with clarity about the things that are most important to do, and a plan for when you will be doing them, is a great way to ensure you're spending your time on the things that matter.

By identifying your three most important tasks and then scheduling when you will be doing them, it will help you be proactive (instead of reactive) about your day and it will ensure that you get to spend time on at least one important activity that's not "urgent".

Moreover, this gives you a target to aim for each day for being productive. You're able to define success and then end the day feeling that you actually accomplished what you set out to do.

This process will also help you learn your capacity for work in a day. And over time you'll slowly begin to get margin and breathing room in your day. And this can help keep you from working long hours every day just to get your whole list done. ▪



# MONTHLY GOALS

*How will you define success for this month? What are your goals and desired outcomes?*

**GOAL 1**

**MOTIVE**

**GOAL 2**

**MOTIVE**

**GOAL 3**

**MOTIVE**

**GOAL 4**

**MOTIVE**

*How will you accomplish the above goals and desired outcomes? What do you need in terms of mindset, resources, time, people, etc.?*

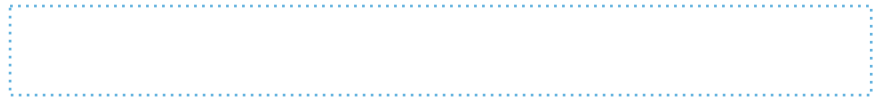
**GOAL 1**

**GOAL 2**

**GOAL 3**

**GOAL 4**

## WEEKLY REVIEW



Write down all your accomplishments, highlights, and wins from the week. Include anything you think of related to work, family, personal, etc.

Look back at your previous week's goals, notes, and tasks and note any loose ends that you may want to continue focusing on in the upcoming week. or unfinished tasks that need to be carried over to the upcoming week.

What were your failures from the past week?

Write down anything you discovered or learned (good or bad).

Is there anything you need to improve on for the upcoming week?

Take a moment to think on how you are coming along with on your overarching big goals and projects.

**WEEKLY PLAN**

[Dotted box for week start/end date]

List this week's three most important goals, and your motivation behind them.

|               |                           |
|---------------|---------------------------|
| <b>GOAL 1</b> | [Dotted box for goal 1]   |
| <b>MOTIVE</b> | [Dotted box for motive 1] |

|               |                           |
|---------------|---------------------------|
| <b>GOAL 2</b> | [Dotted box for goal 2]   |
| <b>MOTIVE</b> | [Dotted box for motive 2] |

|               |                           |
|---------------|---------------------------|
| <b>GOAL 3</b> | [Dotted box for goal 3]   |
| <b>MOTIVE</b> | [Dotted box for motive 3] |

List any events, milestones, or commitments happening this week. Also, any habits or routines you are working on.

**MONDAY**

**TUESDAY**

**WEDNESDAY**

**THURSDAY**

**FRIDAY**

|                         |                          |                            |                           |                         |
|-------------------------|--------------------------|----------------------------|---------------------------|-------------------------|
| [Dotted box for Monday] | [Dotted box for Tuesday] | [Dotted box for Wednesday] | [Dotted box for Thursday] | [Dotted box for Friday] |
|-------------------------|--------------------------|----------------------------|---------------------------|-------------------------|

**NOTES, ETC.**



