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Six-Step Weekly Planning Process

(adapted in part from the books *The Seven Habits of Highly Effective People* and *First Things First*, by Stephen Covey)

1. Review your mission/purpose.

If you do not have a mission statement and you'd like a tool to help you draft one, go to the Mission Statement Builder page at <https://msb.franklincovey.com>. This tool is by no means intended to produce your final mission statement, but it's a good place to start. Over the next several weeks you can refine it until it feels right to you.

Your mission statement represents your values, vision, and purpose for your life.

2. Review your key roles (the big rocks).

Start with *self*, and then identify a *maximum of seven roles* of greatest importance to you. I share my own personal roles below as an example, including sub-roles for my "business owner" role.

Self: physical, mental, spiritual, social

Role #1: Wife

Role #2: Mother

Role #3: Family Member (sister, daughter, niece...)

Role #4: Business Owner →→→→→→→→→→

Role #5: Friend

Role #6: Community Volunteer

Role #7: Singer

Business Owner

Productivity Consultant

Certified Coach

Speaker/Trainer

Writer

Relationship Builder

Manager/Administrator

Lifelong Learner

3. Identify weekly goals/choices -- in writing!

Think of two or three important results you want to accomplish during the coming week in each role you identified in step two. Write this week's goals/choices next to each role.

Your goals reflect the following elements:

- They are driven by conscience and align with your personal vision and mission/purpose.
- Your focus is on the "important" rather than just the "urgent"
- They are driven by "*I choose to...*" rather than "*I have to...*" or "*I should...*"
- These four basic human needs:

Physical (doing)

Social (relating)

Mental (learning)

Spiritual (understanding/being)

4. Organize your time weekly.

Schedule a weekly one-hour appointment with yourself and follow this Six Step Planning Process as you plan each week. Look at the week ahead with your goals in mind and schedule time to take the action required to achieve them.

SUCCESS TIPS:

- Include some unscheduled time. If every minute of every day is already booked, you are setting yourself up for failure. Allow time for unexpected but important activities when planning your week.
- While you're planning, have a stack of 3x5 index cards handy to help you manage distractions. As things pop into your mind that will "just take a second" to do, write them down (one per card) and finish your planning for the coming week. At the end of your planning session, you can either do those things you wrote down, or place in a tickler file for future follow-up.
- Use a weekly planner rather than a daily or monthly planner. If you use a hand-held organizer, do your planning at a computer screen where you can see the whole week at once.

5. Exercise integrity in the moment of choice.

When making schedule adjustments, connect with your mission to stay on track. If something more important comes up, *reschedule* the planned activity for another time. Decisions are based on your priorities. Be a gatekeeper - say *no* to activities or responsibilities which will derail you from living your mission. Don't play the victim; it's your life and you are in control!

"I choose to..." vs. "I have to..."

6. Evaluate and Learn.

"If you keep doing what you're doing, you'll keep getting what you're getting! One definition of insanity is to keep doing the same things and expecting different results." (Stephen Covey)

Before planning the next week, evaluate the previous week by asking yourself these questions:

- What worked and what didn't work?
- What got in the way of me accomplishing what I wanted this past week?
- What did I learn from that?
- Based on my learning, what do I choose to do differently in the coming week.