PLANNING FOR SUCCESS

Master Class

Who Am I?

- Alexis Giostra, aka @MissTrenchcoat
- I design and sell digital tools to help you Work Smarter, Not Harder!
- Blog: StrangeCharmed.com
- YouTube.com/Misstrenchcoat
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I Love Productivity!

- I am the world's laziest person!
- Productivity & Planning helps you do more while working less.
- I am very interested in living a life and running a business that is as free of stress, drama and overwhelm as possible!
- Today, I want to inspire more of you to live a Charmed Life that is focused on achieving your own goals and not just helping other people achieve theirs!

How do you become successful?

"You are what you repeatedly do.
Excellence then, is not an act but a habit."

Aristotle

Redefine Success!

"Success is the result of Preparation,

Hard Work & Persistence."

- Colin Powell

Preparation, Hard Work & Persistence!

◇ Preparation = Goal Setting

◇ ID'ing what you want and how to get there.

◇ Hard Word = Establishing Systems

◇ Functional planning and time management.

◇ Persistence = Routine Building

◇ Making excellence a habit in your life.

Goal Setting

Goal setting is the first step in turning the invisible into the visible.

Tony Robbins

Goal Setting

◇ You can't achieve success unless you know what it looks like

◇ Goal setting is the process of deciding what you want to accomplish and creating a plan to get there.

◇ I do this annually, and usually check on my progress at the mid year mark- but you can really start anytime!

Identify Your Priorities

◇ Things in your life that are more important, and deserving of focus or attention.

◇ *3-5 Priorities*

◇ *Rank them 1-5 in order of importance*

◇ *You should be able to acknowledge why each is a priority and why it is so important to you.*

Set Your Goals

◇ Goals are things you want to achieve, experience or become

　◇ Should be in line with your priorities

　◇ 1-3 goals per priority

◇ This process can and should take you time to get clarity because your goals aren't simple things

　◇ Spend time in introspection, journaling or talking to close friends or family to get clear on your goals

Smart & Stretch Goals

◇ Identify each goal as a SMART or Stretch Goal

　◇ SMART = Specific, Measurable, Actionable, Realistic and Timely

　　◇ Break down the elements of the goal into these 5 characteristics

　◇ Stretch Goals = Goals that push the limits of what is normally considered possible or a reasonable expectation of reality

　　◇ Start with a reasonable plan, knowing you can't see the rest of the staircase and you may need to adjust course as you go

Determine Your Projects

◇ Reverse engineer projects to help you bring your goals to fruition.

　◇ Ask yourself what you are trying to achieve and how you may be able to get there.

　◇ Research your goal, find someone who has done it or ask others for input.

　◇ Brainstorm several strategies if necessary and start with the most complete idea or the path of least resistance.

Map Out Your Projects

◇ Outline your projects on a master goal tracker

◇ *Break them into Short, Mid and Long Term Goals*

◇ *Short (Days to Weeks), Mid (Weeks to Months), Long (Months to years)*

◇ *List out major tasks or milestones for tracking*

◇ *Keep this map with your planner & consult it!*

How Many Projects Should I Have?

◇ This is really a matter of how much you are trying to achieve in a year.

◇ My Rule of Thumb is not to have more than 3 Projects for each time frame.

◇ *Short Term: 3 x 12 = 36*

◇ *Mid Term: 3 x 4 = 12*

◇ *Long Term: 3 x 2 = 6*

◇ Total of 54 Projects for a year! I do ~25-30

3, 5, & 10 Year Plans?

◇ As much as possible, I avoid planning too far in advance- it's hard enough to plan for one year, let alone 5 or 10!

◇ *What happens if/when things change?*

◇ *What happens if you get that job next year and not in 3 years? What if you don't get the job or change fields?*

◇ If you have goals for where you want to be in X years, that's great! You should be using those goals to guide your yearly planning.

◇ *My biggest problem with longer term planning is that things that feel far away don't get priority or feel urgent, so instead of putting a goal on your 5 year plan, decide what actions you can take this year to make it happen and get the ball rolling.*

◇ My **You Got This** Workbook goes into managing longer term life planning if you are interested in that topic, but today's class is not about that.

Let's take a look at how I

approach this process!

Systems

If you're too busy to build good

systems, then you'll always be to busy.

Brian Logue

Systems

◇ What are systems?

  ◇ *A procedure, process, method or course of action designed to achieve a specific result.*

  ◇ *Any process you take on a regular basis*

◇ Planning Systems are integral to the notion of success.

How to Systematize Almost Anything!

◇ Anything you do repeatedly should be systematized.

  ◇ *Make sure the system is still relevant!*

  ◇ *Record the process for how it is done (like you are training someone else to do it).*

  ◇ *Review & Optimize the process*

  ◇ *Establish parameters for how the system and individual actions are triggered*

Planning Systems

◇ Functional Planning is a method of planning that prioritizes action towards desired goals.

  ◇ *It dictates a system that starts at a high level view and works its way down to the specific actions of your daily life.*

  ◇ *It systematizes how you schedule events, track tasks and plan daily or individual actions.*

Step 1: Project Planning

◇ **Functional Planning begins with Project Planning**

◇ *Priorities > Goals > Projects > Project Planning*

◇ *Start by defining the desired outcome, time frame/due date for a specific project.*

◇ *Research the project to understand action steps*

◇ *Break down the project into specific actions that are also time sensitive and assigned to a specific day, week or month.*

Step 2: Monthly Review

◇ **The next part of the functional planning process on the monthly level.**

◇ *Create a monthly calendar of events that lists important reoccurring events, holidays, special dates and important appointments.*

◇ *Create a monthly master task list for all tasks that belong to the month*

◇ *Review the previous months tasks and ensure completed items are checked off project plans to avoid confusion on next actions*

◇ *Transfer open actions from project plans to the monthly task list they belong to & transfer incomplete items from previous months as well.*

◇ *Allocate time to projects by week on the monthly calendar*

Step 3: Weekly Review

◇ **The Weekly Review**

◇ *The next part of the functional planning process taken on a weekly basis (choose a consistent day)*

◇ *Review allocated project tasks and monthly task list to establish your weekly Top 5 priority projects*

◇ *Identify and allocate time for scheduled events*

◇ *Review and allocate time in your schedule for Routines*

Step 4: Daily Planning

◇ Daily Planning

◇ *The night before or morning of, identify the Top 3 actions you need to prioritize for completion*

◇ *List out additional to-do items to execute*

◇ *Review schedule for changes*

◇ *Review and execute daily Routines*

Brain Dump

◇ One planning activity that is always on my Monthly Master Task List is a Brain Dump: the process of removing information from your brain or mental storage system and putting it onto paper.

◇ *Usually, we store a lot of info in our heads, but this is not a proper use of our brain power. "Our brains are for thinking not storage"-David Allen, Author of Getting Things Done*

◇ *Simple process of sitting down in a quiet space with a pen and a few pieces of paper and writing down everything that comes to mind stream of consciousness style.*

◇ *Don't stop to consider anything, don't hold anything back from the paper, let every idea or piece of information you are holding onto go and write it down.*

◇ *You will know you are done when your mind is suddenly quiet. You can also expect to feel a sense of relief and lightness after letting go of all that information you are hold onto.*

◇ *Perform a brain dump at least once a month and get into the habit of writing things down if it's important. Once you have completed a brain dump you can begin to process through the information and record the information where it may belong on a project plan, task list or someday/maybe file.*

Power Hour

◇ Occasionally, we find our to-lists littered with little tasks we have been putting off or ignoring.

◇ *If these tasks are no longer relevant, they need to be crossed out as such, but if they still need to get done but you can't seem to find the time during the workday to prioritize them, try a power hour!*

◇ *Set aside one hour a week to dedicate to these stragglers.*

◇ *Set a timer for one hour and get as many items completed as possible.*

◇ *This technique is also great for jumpstarting productivity on a project you are afraid to start!*

Planning for White Space

White Space is free time you block out to cushion your schedule

- *Prevents overwhelm*
- *Encourages balance*
- *You know you lack white space if you are constantly running late, putting out "fires" at work and at home, and feel like you never get ahead!*
- *How to add white space into your life*
    - *Say NO to obligations that don't serve your priorities*
    - *Overestimate the amount of time it takes for you to complete tasks, meetings or errands*
    - *Delegate or delete unimportant tasks from your to-do list*

Managing Other People's Priorities

You will always get tasks that pop-up from other people.

- *Just because someone asks you to do something, does not mean you are obligated or required to do it*
- *Certain people are priorities for you and the tasks they give you may belong to you, even if its unexpected*
    - *This is why it's important to build white space into your day*
- *If the task belongs to you OR you want to help, you can add it to your to do list, but make sure you are clear on the time frame, expectations AND that you make the other person aware of potential conflicts*
- *White Space and Good Communication can prevent stress and overwhelm!*

Other Tasks

Not all tasks belong to a project plan, so where do they go?

- *If they have a due date, make sure to mark them down on the day they are due. When you review your week, you should prioritize its completion by the due date.*
- *If they do not have a due date but they need to be done in a timely manner, put them on your current Monthly Master Task list, or if you intend to complete them immediately do it or add them to your daily list.*
- *If they have no due date and aren't immediately actionable, put them onto a "Someday/Maybe List" and check this list as part of your Monthly Review*

Let's take a look at how I
approach this process!

Routine Building

For every minute spent organizing,

an hour is earned!

Benjamin Franklin

Routine Building

To persist in excellence, we must establish routines that support our goals.

Anytime we are forced to make a choice we loose a little bit of mental energy, but when we exchange choice for regular routine, we pick up time and save energy.

Certain routines create a habitual practice of excellence, but others can be created to help us control our habits and practice time management.

Morning Routine

How you spend your mornings can set you up for success or failure! Create a morning routine that includes the following:

Wake early

Spend time in meditation/prayer/visualization and gratitude

Make your bed

Hydrate asap

Eat breakfast

Engage in physical activity

Evening Routine

A productive evening routine can help you decompress, process your day and set you up for success the next morning. Include the following in your evening routine:

Prep meals

Lay out clothing

Journal or review your day

Read

Turn off screens at least 30 minutes before bed

Get to bed early

Workday Routine

Depending on the type of work you do, it may be possible for you to turn parts of your day into a routine. Here are some tips for how to achieve this.

- *Get to work on-time*
- *Batch work you frequently do for specific intervals throughout the day or week*
- *Set a time to check and respond to emails and voice mails*
- *Theme your workdays or use a block schedule to focus on specific tasks or regular projects*
- *Establish an end of workday routine that includes cleaning up your workspace, organizing any in-progress tasks for the next day, and making a to do list for the next day.*
- *Leave work on time!*

Self Care Routine

Taking care of your mental, physical and emotional well being should be a priority in your life to prevent the negative affects of stress and burnout.

Depending on how quickly your body gets depleted of energy, you should spend time on a regular basis relaxing and recharging. Try these suggestions:

- *Make sure you get enough sleep each night*
- *Eat at least 3 balanced meals a day and keep hydrated*
- *Practice good hygiene*
- *Engage in stress reducing activities like reading, meditation, and exercise regularly*
- *Set aside time each week for your hobbies*

Meal Planning & Prep

One major time saver I think everyone needs to build into their routine is meal planning.

- *It saves you time, money, and supports your Morning, Evening and Self Care Routines.*
- *This is how I keep it simple*
- *On grocery day I decide my meals for the next week*
- *I add the ingredients to my grocery list (consult recipes if needed)*
- *Purchase the ingredients*
- *If I want to prep any food, I do so on Sunday afternoon by batch cooking and storage*
- *I list out the meal options in my planner (dinners especially)*
- *Each day I decide what I will eat and make for dinner (consult family)*

How to start executing!

Getting Started

◇ Get your priorities, goals and project plans in order with the class materials and downloads

◇ Use the functional planning method to keep on top of your tasks in your planner

◇ Start introducing new routines into your life one at a time. Don't go too fast, it can be overwhelming, start with one routine a month, make it stick and then add the next routine.

Staying on Track

◇ It is so hard to start routines so once you have defined them, you need to put measures in place to support them.

◇ *Block out time on your calendar on a weekly basis to plan. Make this a consistent event on your schedule that does not conflict with anything else and make no other plans during that time.*

◇ *Set alarms and reminders on your phone to keep you on track of your routines.*

◇ *Keep inspiration all around you, from your phone to your computer, desk, car and even your social media feeds! It will motivate you to stick to your plans, give you the willpower to act and through consistent action, you being to change your habits!*

Reward Yourself

◇ Rewards are great motivators for habit changes!

◇ Set yourself a reward for completing projects, sticking to habits, and of course, reaching your goals!

◇ At the very least, understand that these changes bear rewards of their own. When you lay out your clothes the night before and have your lunch packed, you can reward yourself with an extra 15 minutes of sleep because you have given yourself that extra time.

◇ Of course, once you have implemented a few of these positive habits and routines, you will have more than just an extra 15 minutes in your day. Little wins add up to big changes very quickly!

Be Proactive vs Reactive

◇ Get into the habit of being proactive!

◇ A proactive person lays out their clothing the night before, cleans up after themselves, meal plans, does food prep for the week ahead, anticipates their needs and the needs of others they are responsible for!

◇ A reactive person is always behind, waits until things are due or late before getting started, only seems to get done the bare minimum, and falls into bad habits because they are to exhausted to take care of themselves.

Be Realistic & Have Grace

◇ You may be excited to get started, but just remember not to get overzealous with your expectations and take on too much too soon!

◇ Also need to acknowledge that just because you implement these strategies does NOT mean you will never have a conflict, arrive late or miss a deadline

◇ Life Happens!

◇ There will ALWAYS be times when you will need to work late to finish a project, skip part of your self care routine to attend an event or completely forget to do the laundry- DON'T PANIC!

◇ You may also be in a season of your life or come to a season in your life where overwhelm is UNAVOIDABLE so have grace with yourself, understand that it's just a phase, and the more strategic you can be about using your time the quicker you can make your way out of it!

Track Your Victories

◇ Making progress on these strategies isn't easy, and you can easily get discouraged.

◇ Keep track of all the little wins you have

◇ *If you don't, you will look back and think you accomplished nothing*

◇ *If you do, it will help you see the progress and keep you motivated to continue*

Question

How do you become successful?

How do you become successful?

◇ By identifying your priorities and goals

◇ Turning your goals into actionable plans

◇ Building the routines that sustain your energy and productivity!

◇ And of course, executing on it all!

I've taught you the approach,

but it is up to you to Execute!

Don't forget to utilize the class materials to get started
applying what you learned.

Q&A