

Module 2

Toolbox: The Cheap But Essential Supplies You Need To Manage Your Life and Time Effectively

Hi everyone! We are back with Module 2. In many ways, this module is the real nuts and bolts of this course. We talked about our big goals in the last module. This one is all about how to get those things done, and everything else done, too.

This is our tool box, literally the tools we need to manage your life and your time effectively. The tools – you do need to head out to the office supply store or go online and order this stuff. Nothing is expensive; nothing is complicated or weird.

First thing you're going to need is two kinds of notepads, a big ruled pad with lines on it and then, small scratch pads, the kind that you just tear off a sheet. Mine are five by three, or something like that. You buy them in packs of eight.

They just are little pads, and you put them all over the house. Those are very important, and I will explain why in a minute. Next thing you need are two expandable file folders.

Again, they should have these in any office supply store. You're going to get one with 12 pockets, one for each month of the year – January through December, and another one numbered with 31 pockets, for the days of the month – 1 through 31.

You've got your two kinds of note pads, your two expandable file folders. Then you'll need some kind of monthly calendar. I have an old-school day planner where I can see the whole month at once. That works well for me, just being able to write it down on paper. I know: I'm old!

If you're younger or more tech-savvy, maybe you already have something like that on your phone. Whatever works, but you need some kind of monthly calendar. You also need a weekly planner sheet. I will get to that. That's a document you create at your end. I will explain in just a minute how that works.

Getting organized. First thing, you've got your monthly calendar. You might have already started to do this – you're going to write down appointments and commitments with fixed dates.

Your spouse's birthday, the day you need to take the car in, your doctor's appointment that you do annually. Everything that has a day and a time, you write it down on the monthly calendar.

Go as far out as you can. I have a 16-month calendar so if I know, obviously, my mom's birthday falls on the same day every year, put it in there. Put it in as far as your calendar goes out.

The next thing you're going to do: It's best if you can keep everything you need to worry about together in one place. Floating tasks – one per small slip of paper. This might be things that you know happen on a regular basis but you don't have specific dates for those things yet.

Maybe something like your son's physical has to be in March, that would be something you write down on a small slip of paper: "Bring Nicholas into the doctor." You need to get your car inspected – that happens the same month every year – write that down.

Again, stuff that comes up regularly, or even something that you know you need to deal with, but you don't have a fixed date for it, write them down one per slip of paper.

You're then going to file each slip into the appropriate monthly pocket. The appropriate monthly pocket, that's pretty easy. If you need to remind yourself to shop for Christmas presents – maybe you're a last-minute-type person and you want to do it at the beginning of December – it goes in the December folder.

Just file each of those slips. Don't worry about putting them into the appropriate days yet. If it's something right now where you know the day, it should go in your calendar. The monthly pockets are for stuff you know needs to happen in or around this month, throw those all into the months.

Create your weekly planner sheets. I will explain what that is right now. Your weekly planner sheet is going to look something like this. I've given you a Word document that you can customize. This is an example of what mine looks like.

You've got it divided – it's just a Word document – divide it into six columns. I put Saturday and Sunday into one column. You can arrange it any way you like. You've got a column for each day and you put down the things that happen each day of the week or every other week at the same time.

Every week, I print one of these out, and then I scratch out the things that don't happen on the off weeks. Even my housecleaning tasks of wash the sheets, the PJs, the gym clothes, and towels and handkerchiefs. Those are every-other-week tasks, so I scratch those out, the off weeks of those things.

What's great about this, what I really like about it, it's a Word document. It's pretty standard from week to week but things come up, things change. Swim class, we take our kids to swim class every Saturday morning. That doesn't happen in the summer, so in the summertime I just take that little box out.

I personally like to have boxes for things that happen at set times, rather than things that happen any time of the day. But, again, you can do this however you want. This will be a document that you yourself customize and create. This is just to give you an example of what a filled-out one looks like.

We're going to go back to our process. As I mentioned, you're going to file each slip into the appropriate monthly pocket and you've got your weekly planner sheet.

What you do at that point then, you've got these little slips of paper. The next month coming up is March, so you pull out all your slips of paper for March. Now that you're looking at it a

little closer, March isn't just some nebulous month, several months away. March is the next month.

You're going to slot those month's tasks into your 1 to 31 folder.

Even if you don't yet have a set day for something like, "Call for a doctor's appointment," maybe you know you should do that near the beginning of the month. Look at your calendar. This year I'm looking, March 7th is a Monday, I'm going to drop that into March 7th. Something else that's got to happen before the end of the month, maybe the 23rd, I'm going to drop that into the 23 folder. You take the next month's tasks out and just drop them in.

Now my March folder is going to be empty of those little slips of paper because they have all been allocated into the correct day in that 1 through 31 folder.

I'm going to print out my weekly planner sheet for the upcoming week. Then, just this week, looking ahead, I'm going to pull the daily tasks for each appropriate day. You can do this either once at the beginning of the week or just before every day, pull them out and write them down.

Then, daily, we are going to do what we call a daily sheet. That's using your lined notebook paper. I'll show you an example of one of those as well. Again, here's a very messy one. I have terrible handwriting but this is a real life one from my own life.

You'll see, I've got down...what I like to do is I put down the tasks of the day that have to happen that day, but not at specific times, along the left. Then the meetings and things that happen at specific times, I put those along the right.

We had a phone call at 10:00. I had dinner with friends at 6:30, another two o'clock meeting. This lets you see every day, at a glance, what's coming up today. It's nice when you can put the actual timed things on the right. Separate them out so you don't accidentally miss them.

Also, what's nice about this sheet is I like to have this space, below your list or anywhere, white space on the paper if you need to jot down, "Oh, I need to email so-and-so," but I'm not checking email right at this moment in time, so I'm going to just make a note, "Email Fred."

Then I can look at the paper and quickly see that that's going to jump out at me as something I need to do, even though it's not something I want to deal with right at the moment. It lets you write things down so you don't forget them. That is your daily sheet.

We've just talked about your weekly planner sheet and your daily sheet. What you want to do is work ahead as much as possible. Especially for things that happen near the beginning of a day, beginning of a month – you don't want to lose track of those things.

Generally speaking, what I do is for monthly planning, I plan around the 25th of the previous month. That's when I start to look ahead and plan for the next month.

Pull out that folder (again, March is my upcoming month in this example) and look at the little slips of paper, look at what's going on. Flip over, look at the monthly calendar to see what's on the calendar already.

Every week we're going to look, say, Sunday evening maybe – maybe early Monday morning if that works for you. But the thing is you want to look ahead as much as you can.

The daily sheet, I like to do the night before. Again, if there's something I've forgotten about, like an 8 am doctor's appointment, then I can deal with it in time. I'm not finding out about it when it's already been happening.

How do your big goals fit into this planning process? Your big goals fit in in two ways. First of all, you've got to break them down into bite-size chunks. Let's say, just as an example, that running a marathon is your big goal.

The first thing you're going to do is maybe a year from now...let's say you live in Chicago. The Chicago marathon is coming up. I'm going to plan to run it in October. Then you work back and find a training program and look to, "How much do I need to be running? When do I need to register for the marathon? How do I do all this stuff?"

You just break it down and break it down until you get to, this year I need to accomplish this in order to be able to run that marathon in October. That means in September I need to be running this much, and August I need to be doing this. Maybe register for the marathon itself in July.

You're looking at each component of the process and then breaking it down by week, and then by day. What do I need to be doing today to further myself towards this goal? Every task, no matter how big it is, can be broken down into very manageable chunks.

It's important to remember that it's almost like headlights in a car. Even if you're driving a thousand miles, your headlights only really shine about 30, 40 feet in front of the car. That's enough to get you all the way on your thousand-mile journey. You just need to see a little bit at a time.

So, pretty much any great big goal, it's achievable, but you just have to break it down into small enough chunks and get those tasks scheduled on your daily planner and your weekly planner.

Again, with this module, at the end, you'll see there's an attachment that has a single document that explains this process and how it works. This is one of this things that is a little trickier to explain than it is to actually do.

Once you get your folders and start doing this process, you'll see how it works. Obviously, as always, feel free to let me know if you have any questions, and I will catch you in the next module.