



## Daily Planning

If you are familiar with the Adapt system for managing your work in MS Outlook or Lotus Notes, you will be aware that one of the central principles is to create a daily plan of action in the calendar section. Whilst this is usually revolutionary for most people, providing for the first time a centralised, focused view of their priorities, it is also one of the hardest disciplines to maintain over time. We often come across past participants of our training and coaching who started well with the system, but soon slipped into old (bad) habits. 90% of the time this was because they had not embedded the critical discipline of daily planning.

The following article will look at some of the benefits of working with a daily plan, discuss some strategies for keeping your daily plan in focus, and help you to overcome some of the common issues that we come across with our clients' daily plans.

### What is a daily plan?

A daily plan is a snapshot of the activities that you need to get done today. It should be a total list of what needs your focus, and should provide three perspectives:

1. **Fixed work for the day** - Meetings and commitments that have to happen at a specific time
2. **Flexible work for the day** - Tasks and activities that you would like to do today, but can be done at anytime during the day
3. **All day events** - things that are happening today that you would like to be aware of, but do not take any of your time i.e. somebody's birthday

4.

**All day Event**  
Indicates something that is happening today

**Fixed Time Commitment**  
Activity that has a specific start and finish time

**Flexible Activity**  
Task or activity to be done at some stage today

*A view of a Daily Plan in Microsoft Outlook 2007*

The main two activities that should be managed in your daily plan are your meetings commitments, and your task workload. These two types of work should be in balance - there is no point having 6 hours of meetings and 25 hours of tasks scheduled!



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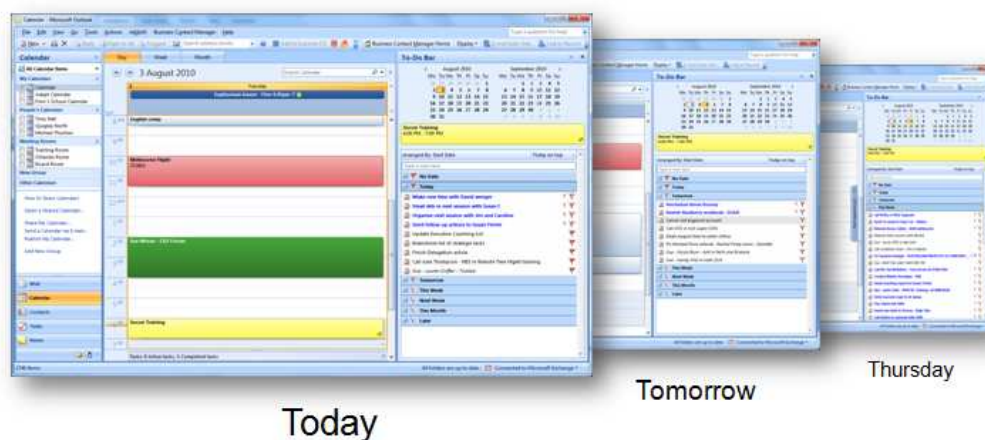
The daily plan above paints a complete picture of everything that needs to be done today, and only that. Your daily plan should be realistic, achievable (with a stretch), providing a clear view of your priorities for the day. In effect, your daily plan should represent *the best use of your time!*

Your daily plan should not include activities that are not a priority for today, are unrealistic or unachievable, or anything that is simply not a good use of your time today. The daily plan is all about providing focus, and if overloaded with non critical activities, loses its focus quickly.

### Part of a bigger picture - a workflow

Your daily plan provides focus for what needs to happen today, but it is important to note that it should be part of a workflow. A good workload management system will allow you to schedule work for future days, and forget about them, trusting that they will come onto your radar screen at the appropriate time. Most people are comfortable employing this concept with meetings - we don't just keep a list of all of our meetings, we tend to schedule them on the appropriate day in our calendar.

But that is just half of the picture, and we need to employ the same technique with our tasks and priorities. Not everything should, or can be done today, so in order to be organised and focused, we need to spread our workload out over time, taking into account the due dates of tasks, as well as our capacity to get them done.



### How do you set up a daily plan view?

If you have participated in an Adapt course or coaching package, you will already have set up your daily plan view. If not, take the following simple steps:

**Microsoft Outlook 2003 users** - Go to the one-day view in the calendar. Click on View>TaskPad. Then click on View>TaskPad view>Active Tasks for selected days.

**Microsoft Outlook 2007 users** - Go to the one-day view in the calendar. Click on View>To Do Bar>Normal.

**Lotus Notes users** - Go to the one-day view in the calendar. Click on Preferences>Calendar & To Do>To Do Tab. Untick Do not display To Do entries in the Calendar.



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### Why have a daily plan?

Many busy people believe that it is not worth taking the time to put a daily plan in place, as the time spent planning will eat into time that could be spent doing the work. This is a false economy, because without a plan in place to provide focus, precious time can be wasted trying to get focused as you go. The truth is, everyone puts a daily plan in place every day, it's just that most people do it in their head, and end up going over the same ground again and again, or forgetting critical things that need action. As amazing as it is, our brain is not actually very good at holding our daily action plan in place!

Once you have daily planning mastered, we believe you will begin to see the following benefits:

- ✓ *Increased focus on your priorities*
- ✓ *Everything in one place*
- ✓ *Better use of limited desk time between meetings*
- ✓ *More realistic sense of what you can get done*
- ✓ *Greater satisfaction and sense of progress and achievement*
- ✓ *Increased ability to negotiate workload (as you can clearly see what you already have on)*
- ✓ *Greater visibility of "must do" priorities each day*
- ✓ *Quicker access to linked information as emails and documents can be attached to calendar appointments and tasks*

### The daily planning process

The daily planning view in your central workload management tool is only a part of what is needed to create an effective daily plan. Some effort is needed each day to pull the contents of your plan into focus, and ensure that your does not just become a rolling list of everything that you have not done yet. While you may not go through this process every day, on the days when you have some time in the office, it should be the first thing that you do (after you get a coffee of course!).

1. **Review your meetings and assess your available time** - Spend a minute considering your meeting commitments, and see what needs to be added (or taken out). Do you need to block out some preparation time for a key meeting? Do you need to schedule in travel time? Do you need to schedule a finish time to the day so you get home in reasonable time? How much time is left over for doing tasks?
2. **Process your incoming work** - Now check your Inbox, In Tray, Voicemail, Meetings Notes from yesterday and schedule in any actions for today. Anything that needs action but not today should be scheduled in your workflow. Take a moment to ask yourself "What else can I think of?" and schedule any additional actions.
3. **Reschedule non-critical activities** - Now, have a look at your task list and work out roughly if it is achievable in the time you have available outside of meetings. If no, you will need to get rid of the actions that are not critical for today, or just are not realistic. There are a few different options here; Dump, Delegate or in most situations, you will decide to Defer the



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tasks to another day. This means rescheduling the task to the appropriate day, again taking into account the due date of the activity, and your capacity to do it on that day.

4. **Plan your work, and work your plan** - Now you should have a focused plan of action in place which is truly the best use of your time based upon your current priorities. You just need to work that plan now by reviewing your daily plan after you complete each action and asking yourself "What is next?"

### Managing the changes in your day

A common concern we hear from clients when discussing the daily plan is about how their day changes all of the time, and their priorities at 9am are no longer their priorities at lunchtime, as new, urgent work comes in. This is a reality in many workplaces, but should not negate the value of putting a rough plan in place each day.

Another function that the daily plan should serve is to provide a reference to measure new incoming work against. If you have A,B and C scheduled for action today, and a new priority D comes into your inbox, you plan should allow you to ask the question "is D more important or urgent than what I already have scheduled?" If yes, space needs to be made for D in today's plan, which may mean that something else needs to be rescheduled. If no, D needs to be scheduled for another time. Simple. This sort of effective decision making gets things done, and keeps you always focused on your most critical priorities. The alternative is just switching from one seemingly urgent job to another, never finishing anything well, and feeling like you are getting nowhere.

### Common daily planning issues

The following are a list of the most common issues we see our clients struggle with when it comes to using a daily plan in either MS Outlook or Lotus Notes. The good news is, they are easily fixed, and once you have mastered this skill, daily planning will become one of the most beneficial disciplines in your kitbag.

#### Issue 1 - Rolling tasks gather moss

*Problem:* One of the features of the daily task list in both Outlook and Lotus Notes is the ability for incomplete tasks to roll forward to the next day. This is extremely useful, as it means that you never leave an unfinished task behind and forget about it. The problem that arises though is, if left unchecked, your task list starts to grow and become fuzzy. After a week or two of rolling, your task list will no longer represent a plan of action for the day, but rather a list of everything you have not done yet!

*Solution:* Apply the daily planning process outlined above. Reschedule any non-critical or unrealistic tasks to the appropriate day. Just because you did not do it yesterday, does not mean that today is the best day to do it! This issue does not tend to happen to meeting workload because of its nature, but tasks need close management, again because of their nature.



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### **Issue 2 - Over scheduling = overwhelming**

*Problem:* We often underestimate how long things will take, and overestimate how much time we have available to do them. This can lead to a situation where we have pre-scheduled meetings and tasks into our day without realistically working out if we have the capacity to get it all done. Then when today comes, we have a bunch of meetings and a list of tasks the length of our arm.

*Solution:* On a weekly basis, look ahead in your calendar and block out some time to protect for doing task workload. This will ensure you do not overload yourself with too many meetings. Another strategy for ensuring the larger, more time consuming tasks get done in a timely manner is to schedule them into your calendar instead of your task list. make a meeting for yourself to get the work done. This works well with tasks that need an hour or more. Either way, always ask yourself when you will realistically have the capacity to do the task before its due date.

### **Issue 3 - Everything is High**

*Problem:* A very common issue we see is the overuse of the High Priority group in your task list. The Adapt system recommends making any task that is a must do for that day a High priority. The High priority tasks will be grouped at the top of the list, and should stand out by changing colour. The whole point of this is to highlight the 3 or 4 critical priorities for the day, giving you a rough order of execution, as well as allowing quick reassessment of your priorities when things change. If you make everything a High priority, you lose the focus it is supposed to give you.

*Solution:* Be ruthless about what you make a High priority. Even if it is important work, only make it High if you must get it done today. As yourself the question "Would I go home if this is not finished?". If yes, just make it a Normal priority.

### **Issue 4 - Task list is not a list of priorities**

*Problem:* When starting out with the Adapt system, many people are moving from a system of managing their work in piles (piles of e-mails, piles of paper). Whilst they know this system is not the most effective, it is comfortable for them as they have been using it for a long time. This can lead to a situation where only low importance tasks get scheduled into the task list in Outlook or Lotus Notes. The important stuff stays in the pile. If this is happening, the Adapt system is never going to be of any great value, and the old system will always win out.

*Solution:* To begin with, get everything into your workflow in Outlook or Lotus Notes. Everything! Make sure your daily plan is a true reflection of your most critical priorities for the day, not just a list of things you are putting off because they are not that important.

### **Issue 5 - The task list has become a project list**

*Problem:* You cannot do a project! Yet so many people put projects into their task list. The problem here is that when we look at the project in our list for the day, we usually don't have 10 hours spare to do it, so we end up procrastinating on it and letting it roll forward. It is important to have a list of your key projects somewhere (and by the way, we refer to any outcome or issue that needs to be



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achieved/resolved and will take more than 2 actions to do it a project). But your daily task list is not the place for projects. It is the place for next action.

*Solution:* With every project that you have going, as yourself "What is the next step, and when am I going to do that?" Then schedule the task for the appropriate day. When you complete that task, ask yourself what the next step is, and so on. Keep a list of your projects in your master task list, or schedule a weekly recurring task to review your projects, and make a list of projects in the notes area of this task.

### **Issue 6 - Too many non time-specific tasks**

*Problem:* Another problem we frequently encounter is people whose daily task list has become fuzzy because it is full of actions that are not time-critical, but they got date-activated and then started to roll. Sometimes work comes in that we need to do at some stage, but other, more pressing priorities will always be prioritised ahead of these tasks. If these tasks start to fill your daily task list, it makes it hard to see your real priorities for the day, and the wheels begin to fall off the system.

*Solution:* Capture non time-critical tasks, but keep them out of your daily tasks list until you are in a position to do them. There are a couple of methods of managing this.

1. Schedule the tasks into your master task list, but don't assign a Start Date to them. This will mean that they will not end up on your daily plan, but are available to review and date activate when you are ready. This solution needs a regular review of the list, otherwise the tasks will get forgotten altogether.

2. Use the first day of the week and the first day of the month as a storage area for things that you want to reconsider for action in that timeframe. If you have a task that you cannot even look at this week, schedule it for next Monday to reconsider then. If you have a task that you cannot look at in the next few weeks, schedule it for the 1st of next month for consideration then. This means that when you get to that day you will have a bigger list of things to consider, but a few minutes scheduling and rescheduling will sort it out. the key thing is that you have not had those tasks cluttering up your daily plan every day, even though you had no intention of doing them.

### **Daily Planning - a way of life**

At Adapt, we really believe in the idea of having a system for managing all of your incoming work, getting your priorities centralised and scheduled, and focusing your time and energy on your core activities and priorities. The daily plan is *the* most critical part of all of those concepts, and in many ways, is the oil that keeps the system running. Good luck in getting your daily plan under control!

"Productivity is never an accident. It is always the result of a commitment to excellence, intelligent planning and focused effort"

Paul J Meyer