

## **Monthly Planning Steps**

1. Block 2-3 hours at the end of each month to plan the upcoming months.
2. Record your Mission/Purpose and identify your most important personal and business goals.
3. Prioritize your top personal and business goals and identify your high payoff activities.
4. Complete Goal Planning Sheets on your top personal and business goals as needed.
5. Set up a tracking method to measure your goals and high payoff activities.
6. Schedule blocks of time for your goals and high payoff activities.
7. Copy your Monthly Planner for those people who need to know your schedule.

## **Daily Organizing Steps**

1. Take 5-10 minutes to plan and prioritize each day.
2. Transfer all scheduled appointments and commitments from the Monthly Planner to the daily organizing page.
3. Review all of your scheduled commitments and appointments for the week.
4. Organize each day from your top personal and business goals and high payoff activities.
5. Prioritize your imperative and important lists.
6. Organize and group your communication using the Conference Planners.
7. Close out each day, record the day's accomplishments, and track your progress.