



FOCUS
| ACHIEVING YOUR HIGHEST PRIORITIES

AUDIO WORKBOOK

TABLE OF CONTENTS

Section 1: Where Do You Spend Your Time?	1
Section 2: Identifying Your Values	17
Section 3: Setting Goals for Yourself	31
Section 4: Giving Yourself a Weekly Plan	47
Section 5: Carrying Out Your Daily Plan	59
Section 6: Using Your Planning System: Part 1	75
Section 7: Using Your Planning System: Part 2	93
Section 8: Integrating Your Systems and Keeping Your Focus	107

© 2004 FranklinCovey. All rights reserved. Printed in the United States of America.
This publication is intended only for individual use. No part of this publication may be reproduced, distributed, transmitted or presented in any form or by any means, electronic or mechanical, including photocopying, recording, or use of any information-storage or retrieval system, for any purpose without the express written permission of FranklinCovey.

All terms such as company and product names appearing in this work may be trademarks or registered trademarks of their respective owners. No investigation has been made of trademark rights in any such terms by FranklinCovey. Marks which are understood to be owned by others are capitalized or marked.

All persons, companies, and organizations listed in examples and case studies herein are purely fictitious for teaching purposes unless the example expressly states otherwise. Any resemblance to existing organizations or persons is purely coincidental.

SECTION 1

Where Do You Spend Your Time?

CHECK IT OUT!

WHERE DO YOU SPEND YOUR TIME?

Overview

Do you ever feel like you're continually racing back and forth trying to decide what to do first? Do you find yourself saying, "But this is really *urgent*. How can I not do it right away?" Does urgency always take precedence over importance in your daily life?

In this section, you will learn the difference between those things that are truly important and those that are merely urgent, and why this difference is important. You'll discover the impact of living your life in an "urgent" mode, and develop ways to begin focusing on what's important to you.

Time Estimate

It should take approximately 2 hours to complete this section's material.

Objectives

After successfully completing this section, you will be able to:

- Understand the difference between important and urgent.
- Determine how you're spending your time, and find ways to minimize or avoid unproductive time usage.
- Focus your time and energy on the important things in your life.

Activities

During this section, you will complete the following activities:

- **Your Personal Time Matrix™.** In this activity, you'll identify some of the major things you find yourself doing in life and put them in the appropriate quadrant in the Time Matrix.
- **Pick a Quadrant, Any Quadrant.** In this activity, you'll discover some of the feelings and long-term effects associated with spending large amounts of time in each quadrant of the Time Matrix.
- **Take the FranklinCovey Urgency Analysis.** This fun and interactive self-assessment will give you a clear picture of where you're spending your time, as well as some feedback on how to spend your time more productively.

LISTEN UP!

WHERE DO YOU SPEND YOUR TIME?

Listening

FOCUS: Achieving Your Highest Priorities™ CD

Disc One: Tracks 1–4

Time Estimate

45 minutes

Food for Thought

It's easy to say you're doing what's most important in life, but when you really take the time to ask yourself what your highest priorities are, there may be a gap between what you want to be doing and what you are doing.

1. What things or situations in your life make you wish you had an extra hour?
2. Considering your life right now, how realistic would it be to think you'd actually use your extra hour for the things you'd like to use it for?
3. Do you find yourself saying yes when you'd much rather be saying "no way"? What makes saying no so difficult? What would happen if you did say no—to your boss, to your partner or spouse, or to your mother (heaven forbid!)?

GETTING DOWN TO IT—PART 1

WHERE DO YOU SPEND YOUR TIME?

Time management. You hear the term all the time, but what does it really mean? How do you actually "manage time"? Can you manage time, or can you merely manage yourself within the set amount of time you have each day?

"Time management" is a myth. It would be more appropriate to call it "self management," "life management," or "event management." Isn't that what you really do? This audio and workbook is about learning how to manage yourself, your life, and your events within the 24 hours you're given each day. You will learn to apply what you learn here to virtually every aspect of your life. We want you to feel more balanced, less overwhelmed, and more able to decide what's really important to you. You will learn concepts and practice skills that will help you do just that—if you are committed to making the necessary changes. So, adjust your chair, fasten your seat belt, and hang on for the ride!

The Extra Hour

Things which matter most must never be at the mercy of things which matter least.

JOHANN GOETHE—German poet, novelist, and playwright

It would be great to have an extra hour in the day to do everything you "just don't have time for." You probably have a good idea of what you'd do with an extra hour, and it probably isn't something work-related. But the reality is that you don't have an extra hour.

The interesting thing is that you know the things you'd do with an extra hour are important, and that's why you say you would spend your extra time on them; but you know they wouldn't get that extra hour devoted to them anyway. That's the great irony: You know they're important, and yet you spend day after day chasing after everything *but!* You spend your days running faster and faster, trying to keep up with this ever-speeding world. You try to be super everything—super department manager, super family member, super friend. And at the end of most days, you look back and say, "I wasn't productive today. I wasn't really focused on anything



You must identify and focus on the things in your life that are truly important and meaningful, both personally and professionally.

Image © 2003 FranklinCovey

meaningful.” When we’re trying so hard to do so much, why do we still feel like we’re not doing enough?

It isn’t a matter of wanting to be totally controlled and tightly scheduled. For most people, it’s more a matter of getting to the end of the day and wondering if you’ve made a contribution, a difference. It’s a matter of wondering if you’re focusing on what’s truly important. That wondering is most likely rooted in the fact that it’s hard to pick out the “most important” things when everything seems important. You’re not alone in this situation. Many people are asking the same types of questions, feeling the same types of feelings, and experiencing the same sense of dissatisfaction at the end of the day.

Is It Important or Just Urgent?

Because we don’t know what is really important to us, everything seems important.

Because everything seems important, we have to do everything. Other people, unfortunately, see us as doing everything, so they expect us to do everything.

Doing everything keeps us so busy, we don’t have time to think about what is really important to us.

ANONYMOUS

You want to start feeling like the accomplishments you make every day are meaningful ones, so let’s get busy making that goal a reality. The Time Matrix™ is a tool designed to help you understand exactly where you are spending your time. It’s a mind-set tool that will help you filter out meaningless urgencies.

You’ve already heard the definitions of important and urgent, but since these are such crucial concepts to understand, let’s review them. Important is defined as “of much import, carrying with it serious consequences; weighty, momentous, grave, and significant.” Urgent is defined as “pressing, compelling; calling for or demanding immediate action; anything characterized by urgency.”

Basically, what that means is this: important things have to be done. If we don’t do them, there will be serious consequences. We may not have to confront these consequences immediately, which is why we often find ourselves neglecting the important things in our lives. Unfortunately, if we don’t take care of the important things, those grave consequences can creep up sooner than we may think.

Urgent things, on the other hand, feel like they *have* to be done. We are often distracted by urgent things—“fires” that need to be put out right away—that take our focus away from the things that truly matter to us. We feel the call of urgency, but unfortunately, it’s not always an important calling. Contrary to how it may seem, urgency is often a matter of feeling, while importance is more a matter of fact.

Furthermore, there are times when you must deal with matters that are both important and urgent. Taking good care of yourself physically is always important, but when it becomes an emergency and you’re having a heart attack, it’s both important *and* urgent. Setting up and following through on a date night once a week is also pretty important, but it’s not both important and urgent until your spouse wants a divorce. Getting that degree in your particular field of interest is right “up there” for you, but it’s not urgently important until you’re suddenly thrust into the position of needing it *now* because of a layoff.

The point is that there’s a crossover between important and urgent activities. We know there are important things in our lives to which we should be devoting more time, but we’re often so wrapped up in taking care of urgent matters that the activities, people, and relationships that really matter to us end up on the “back burner.” One of the most valuable things you’ll learn from this audio and workbook is how to make sure this doesn’t happen anymore. If you manage the important things appropriately, they won’t become urgencies most of the time. You don’t always have control over urgencies, but you can decrease them.

How This Audio and Workbook Can Help

It has been said that it takes 21 days to form a new habit. As you progress through this audio and workbook, we’re going to ask you to adopt some new habits into your daily life. You will be asked to learn and, most importantly, use new skills that will help you plan your weeks and days in an effort to accomplish the things you want to accomplish. You’ll see that once you start spending your time doing things that truly mean something to you, some of the negative or dissatisfied feelings you have now will be replaced by more positive feelings.

You may be wondering if what you’re going to learn here really works. Yes, it does. The Jack Phillips Center for Research, a division of FranklinCovey in Salt Lake City, Utah, and a nationally recognized research entity, studied the results that thousands of people who have gone through workshop content like this were seeing in their lives. They found that most people who put the skills they learned to daily use actually felt more balanced, and that they were much more able to get done the things that mattered. These people found it easier to set goals and plan their time in ways that helped them achieve those goals rather than have them fall by the wayside.

We’re confident that you’ll see those same results when you’ve worked through this material. But there is a catch: you have to actually do it! You have to make the commitment to put aside old habits and form new ones. Having knowledge means nothing unless you’re willing to put forth the effort to make the necessary changes. We’re here to help you do that, but at the end of the day, it’s really up to you!

GETTING DOWN TO IT—PART 2

WHERE DO YOU SPEND YOUR TIME?

If you want to make good use of your time, you've got to know what's important and then give it all you've got.

LEE IACOCCA—former U.S. automobile executive

The Time Matrix: Focusing on What's Important

The Time Matrix model was developed as part of Stephen R. Covey's bestseller, *The 7 Habits of Highly Effective People*. Using the concepts of importance and urgency, Dr. Covey realized that all of our daily activities could be easily categorized in four different ways: (1) important and urgent, (2) important but not urgent, (3) urgent but not important, or (4) neither important nor urgent. From this, he designed the Time Matrix to give his readers a visual way of understanding how they spend their time. The Time Matrix is divided into four quadrants. Let's take a closer look at each.

	Urgent	Not Urgent
Important	I NECESSITY	II PRODUCTIVITY AND BALANCE
Not Important	III DECEPTION	IV WASTE AND EXCESS

Every activity or task that we do can be categorized into one of the four quadrants of the Time Matrix.

(Image © 2003 FranklinCovey.)

QUADRANT I: THE QUADRANT OF NECESSITY

Quadrant I is reserved for things that are both important and urgent. These things have to be done out of necessity. If we don't do them, there will be grave consequences.

Examples of Quadrant I activities include caring for an injured child (for those of you who are parents or grandparents), fixing a system breakdown (especially if you're the systems person), handling a request from your boss, dealing with an angry customer, and filing your taxes (especially on April 14th).

QUADRANT III: THE QUADRANT OF DECEPTION

Let's skip to Quadrant III. Activities in QIII are those that aren't really important, but that still feel urgent. This category can be tricky because these things do call out for your immediate attention, but there are no real consequences attached to them if they don't get done.

A Quadrant III activity typically demands that you "come right away," but when you get there, you often wonder what the rush was. That's why it's called the quadrant of deception. It's easy to be deceived into believing something is truly urgent and important when it's not. Your desire to please others often kicks in, and your sense of urgency rises. Many people actually perceive this feeling of urgency as importance. It's not!

Have you ever been sitting in a meeting and wondered why you were there? That's QIII. Have you ever been asked to come over right away because someone really needs to talk to you, and when you drop everything to get there, you find it's nothing serious? That's QIII—urgent, but not important, and usually from someone else's perspective!

QUADRANT IV: THE QUADRANT OF WASTE AND EXCESS

Quadrant IV things are neither important nor urgent. They are a total waste of time. With this quadrant, the word "excess" is key.

Not all TV is bad, but how many evenings have slipped by while you watched hour after hour of reality TV? Not all computer games are bad, but have you ever found yourself thinking you've been playing for 30 minutes only to find that three hours have gone by? Talking on the phone isn't always bad, but if personal calls are interfering with your job, then what? That's why this quadrant is called the quadrant of waste and excess.

It's okay to give yourself a little relaxation time in Quadrant IV. Sometimes you just want to kick back and relax in front of the TV, even though the desire is neither important nor urgent. The key is not to waste excessive amounts of time on these activities, especially when you're doing them at the expense of truly important things.

QUADRANT II: THE QUADRANT OF PRODUCTIVITY AND BALANCE

So we're back at Quadrant II, the quadrant of productivity and balance. Sounds like a much better place to be, doesn't it? This is where you'll find things that are important, but not urgent. You need to do these things, but not right now. There are definitely consequences attached, but you may not see them for a while. The key is that, unlike some of the other quadrants, Quadrant II activities don't act on *us*. Instead, we need to act on *them*.

Remember how you felt when you spent some one-on-one time with a special child in your life? How about the sense of satisfaction you got when you finally put on those expensive new walking shoes and actually did some serious walking? Or what about the relief that washed over you when your presentation for work was completed a day early? Those are all QII activities!

It's unfortunate that so many of us push these important activities aside to make room for more urgent tasks, especially when we discover that those urgent tasks weren't all that important to begin with. That's what this is all about: helping you identify the important things that you've been pushing aside because you'll "get around to them sooner or later," and encouraging you to give those things higher priority. After all, those are the responsibilities and activities that really mean something to you.

Long-term perspective is a large part of Quadrant II. You may not see immediate consequences, but they will come. Building and maintaining relationships has a huge payoff in the end, doesn't it? So making time for relationships now gives you a reserve to draw on in the future. We'll learn more about relationships as QII activities later.

But This Looks So Hard!

A "no" uttered from the deepest conviction is better than a "yes" merely uttered to please, or what is worse, to avoid trouble.

MAHATMA GANDHI

When you look back at some of the previous examples, you can see that other people have a big impact on where you spend your time. Two things people find most difficult to do are managing interruptions and saying no.

In your audio CD packaging, there is a small foldout called *Keeping Your Focus*. Take a minute to flip through it and find the section entitled "Managing Interruptions." How many times per day are you interrupted by the phone, someone at your door, or a multitude of similar things? Perhaps you always have to drop your bills or personal correspondence to defuse petty situations between your warring children. The many interruptions you run into throughout your day have probably left you ready to pull out your hair (if you have any!).

Now take a look at the section entitled "Saying No." This is something at which most of us need to get much better. It's easy to create a Quadrant III culture—unless you have the ability to say no when it means the most. Try using some of the foldout's suggestions for managing interruptions and saying no, and see if it helps.

The Place to Be

FranklinCovey collected assessment results from hundreds of people studying material much like this, and found that 50 percent of people's time is spent in Quadrants III and IV—the two "not important" quadrants. Fifty percent of the people surveyed spend *half their lives* doing things that are unimportant!

Acting on Quadrant II will take concentrated effort. Remember, it doesn't act on you, you act on it. The great thing is that the more time you spend in Quadrant II, the less time you'll end up spending in Quadrant I. It increases your capacity, and then shrinks Quadrant I as a natural result.

Spending time in Quadrant II increases the quality of your personal life and the productivity of your professional life. It's a great place to be! Obviously, you can't (and shouldn't) spend all your time there. Eventually, Quadrant I things will crop up that need to be taken care of, but if you spend the majority of your time in Quadrant II, the benefits are innumerable.

SELF-ASSESSMENT ACTIVITY 1

Live Above the Line

What we're really striving for is to "live above the line."

The heavy horizontal line you see in the corresponding graphic divides the important from the unimportant. Living above that line, in Quadrants I and II, will help you live a more productive, balanced life.

The Time Matrix is a powerful mental tool that will help you clearly assess where your time is spent. Focus on living above the line and you'll see a marked increase in the quality of your relationships, your productivity (both personally and professionally), your health, and your ability to handle Quadrant I urgencies when they do come along.

	Urgent	Not Urgent
Important	I MANAGE	II FOCUS
Not Important	III MINIMIZE	IV AVOID

Spending more time "above the line" on QI and QII activities ensures that you are focusing on the important things in life.

(Image © 2003 FranklinCovey.)

Food for Thought

1. If you had an extra hour in the day, what would you do with it?
2. What gets in the way of you being more productive?
3. How do you think you will feel after spending three weeks intensely focused on identifying and working toward achieving your highest priorities?
4. In what ways will using the concept of the Time Matrix help you begin to "live above the line"?

WHERE DO YOU SPEND YOUR TIME?

Your Personal Time Matrix

We've given you examples of specific activities that fall into each of the four Time Matrix quadrants. Take a few minutes to come up with 3-4 specific examples from your own life for each quadrant.

Time Estimate

Approximately 15 minutes

Instructions

Using the blank Time Matrix model below, fill in each quadrant with the examples you thought of from your own life.

Food for Thought

1. What "aha!" moments did you experience as you filled out your Time Matrix? What discoveries did you make about yourself?

	Urgent	Not Urgent
Important	I NECESSITY	II PRODUCTIVITY AND BALANCE
Not Important	III DECEPTION	IV WASTE AND EXCESS

SELF-ASSESSMENT ACTIVITY 2

WHERE DO YOU SPEND YOUR TIME?

Pick a Quadrant, Any Quadrant

This activity builds on the previous one by moving beyond merely identifying different types of quadrant activities to reflecting on the feelings and long-term effects associated with spending most of your time in each quadrant.

Time Estimate

Approximately 10–15 minutes

Instructions

Using the examples you came up with in the previous activity, make a list of how you would feel if you spent the majority of your time on those particular activities. Then list the long-term effects of living with those feelings.

For example, let's say you listed a weekly community project meeting that almost always starts late, is unproductive, and goes over its time limit. You may feel frustrated, "antsy," and that your time is not valued or respected. The long-term effect of those feelings might be a lack of commitment to the project or a decision to never work on a community project again.

Food for Thought

1. What recurring feelings and long-term effects are you seeing? Do certain words or descriptors keep popping up? What are they?
2. How easy or difficult do you think it would be to begin moving yourself toward spending more time in Quadrant II? What steps can you begin to take right now?

SELF-ASSESSMENT ACTIVITY 3

WHERE DO YOU SPEND YOUR TIME?

Take the FranklinCovey Urgency Analysis

This fun and interactive self-assessment will help you determine where you spend most of your time. Are you addicted to urgency? You're about to find out! Following the assessment, you'll be given some suggestions for ways you can improve. You will need to be connected to the Internet for this activity.

Time Estimate

Approximately 10–15 minutes

Instructions

Step 1: Go to www.franklincovey.com.

Step 2: Near the top of the page, hover your mouse pointer over "Effectiveness Zone."

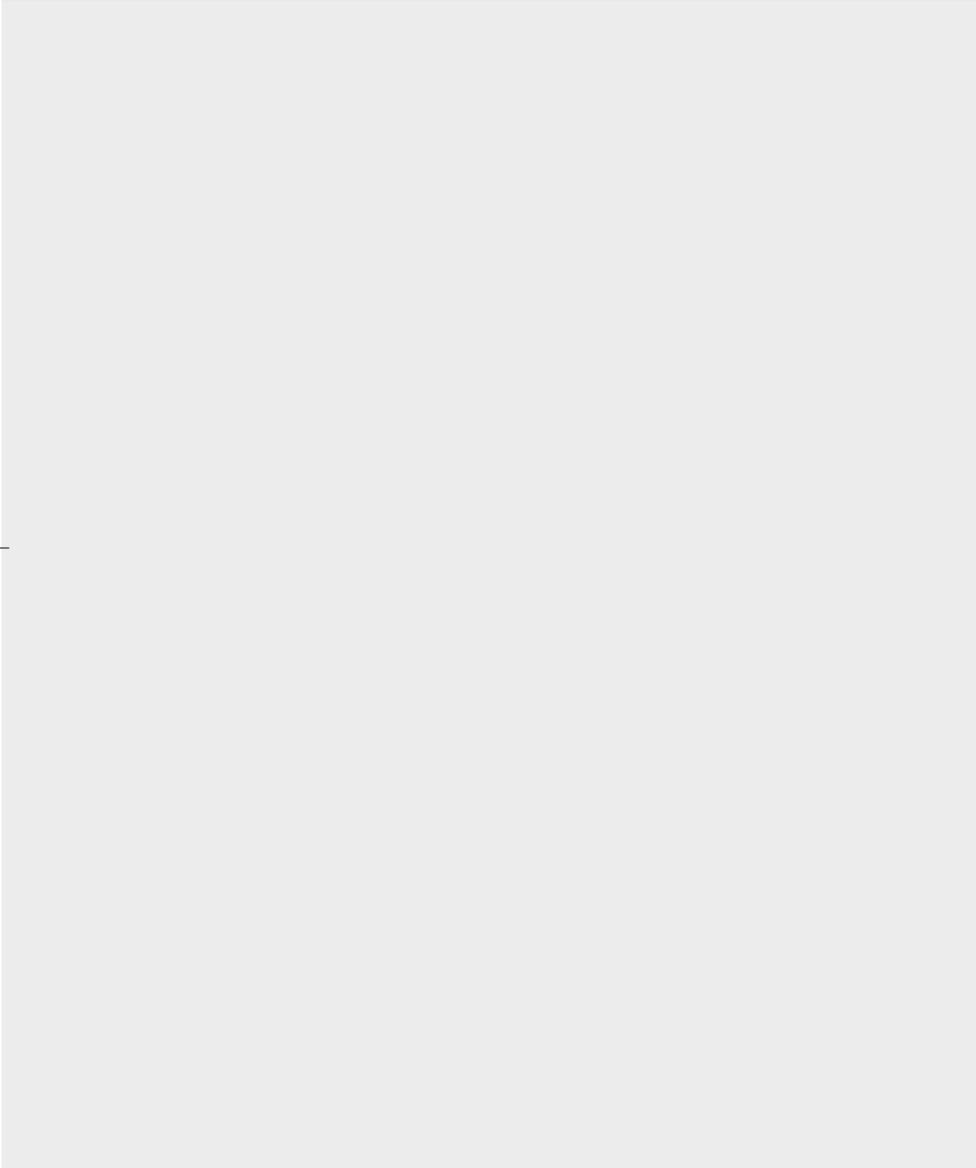
Step 3: From the drop-down list that appears, click the "Assessment Sector" link.

Step 4: Begin the "Urgency Analysis."

Step 5: When you have finished the assessment, the time you tend to spend in each quadrant is identified. You will be presented with two buttons for additional options. Click the "Interpreting the Urgency Analysis" button to get a description of your main quadrant, ideas for next steps you can take, and tips on how to spend more time in Quadrant II. Click the "Tell Me More" button if you want to explore other FranklinCovey assessments on your own.

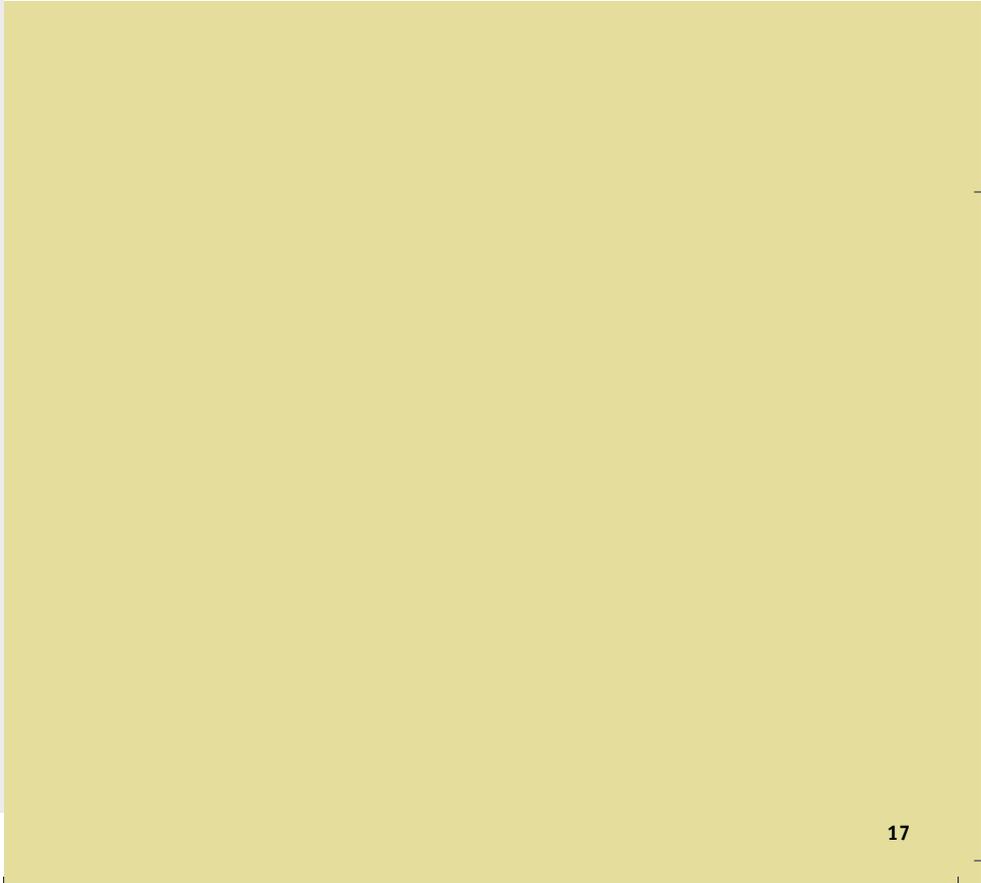
Food for Thought

1. Were you surprised by the results of your assessment? Explain.
2. Did you make any discoveries that will be helpful to you as you work on spending more time in Quadrant II? Share them here.



SECTION 2

Identifying Your Values



CHECK IT OUT!

IDENTIFYING YOUR VALUES

Overview

In the first section, you investigated the difference between important and urgent activities. You also used the Time Matrix tool to determine in which quadrant you spend most of your time.

Next, you'll be introduced to the Productivity Pyramid™ model. This model emphasizes a four-tiered approach to planning your life, and will help you stay on course and keep a clear Quadrant II mind-set. You'll then take some time to discover your values—the core beliefs you hold dear. Are your decisions guided by your governing values? They should be! Once you've determined your highest values, you'll create clarifying statements for each of them. Putting these statements down on paper will help you solidify what's important to you, and will give you the guidance to work toward living those values each day of your life.

Time Estimate

It should take approximately 2 hours to complete this section's material.

Objectives

After successfully completing this section, you will be able to:

- Apply the ideas of the Productivity Pyramid to bring focus and balance to your daily life.
- Identify and clarify governing values that will provide vision and direction in your life.

Activities

During this section, you will complete the following activities:

- **Interviewing a Values Role Model.** In this activity, you'll interview someone who has gained your respect and admiration through truly living his or her values. You will discover what works for this person and try to apply some of his or her ideas to your own life.
- **Time to Make Choices.** In this activity, you will list your governing values, then refine and prioritize the list. This will help you to determine what forces you'd most like to have guiding your life.
- **A Little Clarity, Anyone?** In this activity, you will create a clarifying statement for each of the governing values you listed in the previous activity.

LISTEN UP!

IDENTIFYING YOUR VALUES

Listening

FOCUS: Achieving Your Highest Priorities CD

Disc One: Track 5

Disc Two: Track 1

Time Estimate

30 minutes

Food for Thought

The Productivity Pyramid is a great model for helping you get on the path you're seeking. The key to using this tool is to start at the bottom—the base—and work your way up. The base, Identify Values, is the best place to start because it's where you're going to get the strength to build on as you work through this material—and throughout your life.

1. To what degree have you previously been aware of how your values drive your behavior? Have you ever thought about it from this perspective before? Explain.
2. How does it make you feel when you know others are not living by what they claim they value?

GETTING DOWN TO IT—PART 1

IDENTIFYING YOUR VALUES

When your daily activities are in concert with your highest priorities, you have a credible claim to inner peace.

HYRUM SMITH

Are you living your life in alignment with your governing values? Do you even consciously know what they are? Have you ever taken the time to clearly define your values to yourself and honestly asked yourself how you plan on living a life built on them? This is just what you're going to do in this section. But first, we'll take a look at why it's so important to establish clear values and, even more importantly, to hold yourself to them.

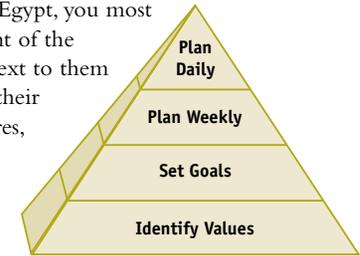
The Productivity Pyramid: A Model for Planning Your Life

If you've ever had the opportunity to travel to Egypt, you most certainly have a vivid memory of your first sight of the ancient pyramids. They're huge! As you stand next to them and gaze upward, you can't help but marvel at their impressive size. It's incredible that these structures, built thousands of years ago, are still standing.

So why have the pyramids been able to weather centuries of change and still stand tall? As suggested in your audio, the endurance of the pyramids has to do with their construction. The Egyptians intended them to stand forever as monuments to

their belief that humanity would go on forever, and it just so happens that the pyramid is the most stable geometric form for use in vertical construction. The pyramids are built on a rock-solid base or foundation that supports the great weight above. Without this strong base, they would have crumbled long ago.

Now think about your life. Is there anyone at whom you marvel? Is there anyone who has seemed to resiliently weather life's challenges and always stand firm? Perhaps a particular parent, grandparent, teacher, or friend springs to mind. Odds are that there's someone marveling at you as well! The pyramid is the perfect structure to use as a model for a life plan. It has a strong base, is enduring, and its construction leads the eye upward to a focal point at the top. Let's see how this strong life-plan model is reflected in the Productivity Pyramid.



A pyramid, with its strong base and focal point at the top, is the perfect shape for a life plan.
(Image © 2003 FranklinCovey.)

The Base: Identify Values

The Productivity Pyramid has values at the base because our values represent what matters most to us. They're the source of our passions in life, and they help us determine where we focus our energies. All of our choices and decisions should spring from our values. Our values should be the driving force behind virtually everything we do. If they're not, there's a crack in the base of our life's monument—our own personal pyramid—that could mean that the entire structure is unstable.

Let's take Joe, for instance. He loves to travel and be outdoors. He thrives on excitement, and loves seeing new places and enjoying new experiences. Therefore, we can say that Joe really values adventure and freedom.

The Second Tier: Set Goals

While your values certainly suggest and help you realize the greatness you can achieve, a great life doesn't just happen. A great life is created and built one step at a time, exactly like the pyramids. Do you think the ancient Egyptians started building without a blueprint of some kind? Goals are a type of blueprint. From the values you identify in this section, you'll learn how to create blueprints (or goals) based on those values and on your highest priorities.

Because Joe (our hypothetical, fun-loving guy) truly values freedom and adventure, one of his goals is to take a whitewater rafting trip on the Colorado River with his friends next summer. He's decided what he truly loves in life, and has given himself a tangible activity to shoot for that is in line with that decision.

The Third Tier: Plan Weekly

The Plan Weekly tier of the pyramid is where you start to make the values and goals that you've established for yourself a reality. Weekly planning is a process where you take 20 to 30 minutes and schedule time for your most important goals, relationships, and responsibilities. If you're looking for a way to find more balance in your life, this is where you will begin to noticeably reap the rewards.

Let's peek into Joe's life again, shall we? Joe sits down on Sunday evening to take a look at what he has scheduled for the coming week. Since he has decided that he values adventure and freedom, and that he really wants to take that rafting trip, he schedules some time on Wednesday afternoon to search the Internet for information on Colorado River rafting trips.



If you establish a life plan that's based on your core values, you will be happier and more productive.

(Image © 2003 FranklinCovey.)

The Peak: Plan Daily

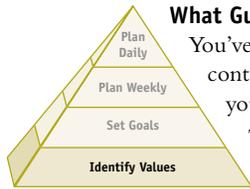
Daily planning is where you learn how to “stay above the line” by keeping what matters most in sight as you effectively juggle other competitors for your time. It's where you set aside a few minutes at the beginning of each day to review your tasks and appointments in order to make sure the items you scheduled in Weekly Planning take first priority. You're probably saying, “Juggle? I'm sick of juggling! That's why I wanted to buy this CD and workbook!” Well, guess what? You probably won't ever completely eliminate juggling from your life, and that's okay. This material will teach you ways to juggle without feeling so overwhelmed.

When Joe sits down on Wednesday morning, he sees that he has several things going on that day. He would like to take his mountain bike in for repairs that afternoon, but he has scheduled time to search for river-rafting trips. Because this is his priority, he schedules time to take his bike in on Thursday instead.

Although we've briefly introduced the four tiers of the Productivity Pyramid, our main focus for now is on the base: Identify Values. Subsequent sections will tackle the other tiers in greater detail. Now that you know more of what to expect as you work up through the tiers of the Productivity Pyramid, let's get started on building that strong base.

GETTING DOWN TO IT—PART 2

IDENTIFYING YOUR VALUES



What Guides Your Decisions?

You've probably heard the word *values* used in several different contexts. When we talk about values, we mean your standards, your ideals, and your highest priorities.

There are many values in the world, but you would most likely be hard-pressed to say you espouse all of them. For instance, when you take your car to the shop, you expect the mechanic to give you a fair appraisal of the problem, a fair price, and to eventually fix the problem. This can be called *honesty*, and honesty is definitely a value most people hold in high regard. Other values include patience, respect, integrity, and creativity, to name just a few.

People may have certain characteristics that you admire, such as charisma or public-speaking skills, but don't confuse these *characteristics* with *values*. Values are more than skills; they are the concepts, ideals, and beliefs that define us. We each have a certain set of values we've chosen for ourselves—our core values. Core values are also known as governing values. Core values are at the heart of who you are and why you do the things you do. They are what drive your behavior and decisions.

Think back to the story of Ben Franklin and his set of virtues or values. He started with 12, but a friend suggested that he add one more—humility. Thinking it was a nice idea, he added it to the bottom of his list. Unfortunately, humility was never one of Ben's strong points, and so he was never able to truly embrace it as one of his own governing values.

It would be easy for any of us to do the same thing. It's easy to say you value honesty, for example; but is it honesty in yourself, or just in others? Do you say you value the environment, but don't recycle? Do you say you value family, but never seem to have time to devote to yours?

As you think about your governing values, it's important to take time to consider each one and give it a rank of some type. You could probably spend days coming up with things you value, but your list of *governing* values might not be very long. Remember, governing values are the things that drive your behavior and ultimately guide your decisions.

BENJAMIN FRANKLIN'S VALUES	
Temperance	Sincerity
Silence	Justice
Order	Moderation
Resolution	Cleanliness
Frugality	Tranquility
Industry	Chastity
Humility	

Just as Ben Franklin did, you should develop a list of the governing values that truly drive your behavior and decisions.

(Image © 2003 FranklinCovey.)

Clarifying Your Values

Values are like fingerprints. Nobody's are the same, but you leave 'em all over everything you do.

ELVIS PRESLEY

There is a second step to making those values a guiding force in your life, a step which Ben Franklin took: he clarified them. He created a verbal picture, so to speak, to better understand what he needed to do in order to fully live his values. When you clarify your values, you actually visualize yourself living them, which increases the probability that you will use these governing values to help guide your decisions.

In the image below, look at the statement for "order." Franklin says, "Let all your things have their places; let each part of your business have its time." Although the language is a bit dated, you get a much better sense of his intent when you read that clarifying statement, don't you? Without it, "order" could mean just about anything.

Let's say you value diversity. Your clarifying statement for this governing value might read, "I will seek out and celebrate those who have differing opinions, backgrounds, lifestyles, and goals than I." That simple statement says a lot, doesn't it? It encompasses much more than just accepting another person's gender or race. If you make the effort to live up to a clarifying statement such as this, it will drive you to seek out the company of people who are different from you, learn more about them, and understand and overcome your differences. It will challenge you to live your life as a more accepting, loving human being. A clarifying statement doesn't muddy the water and make it difficult to live that value, but rather makes your intent crystal clear. Yes, holding yourself to these statements requires effort, but if you make that effort, you'll see that one sentence can hold a lot of power!

Identifying and clarifying your values gives you a foundation and helps you see your highest priorities in life. It helps you make the right choices without fear or regret. You have the choice every day to either live in alignment with or ignore your governing values. Which will you choose to do?

BENJAMIN FRANKLIN'S CLARIFYING STATEMENTS	
Order	Let all your things have their places; let each part of your business have its time.
Frugality	Make no expense but to do good to others or to yourself; that is, waste nothing.
Sincerity	Use no hurtful deceit; think innocently and justly; speak accordingly.
Justice	Wrong none by doing injuries, or omitting the benefits that are your duty.
Tranquility	Be not disturbed at trifles, or at accidents common or unavoidable.

Clarifying statements, like Ben Franklin's shown here, are positive affirmations that help you put your values into practice.

(Image © 2003 FranklinCovey.)

INTERVIEW ACTIVITY

IDENTIFYING YOUR VALUES

Interviewing a Values Role Model

In this activity, you will interview someone whom you admire and respect, who is devoted to living his or her values. You will introduce the concept of clarifying statements and ask your interviewee to come up with one for each of his or her top three values.

Time Estimate

30 minutes

Instructions

Step 1: Set up an interview with someone you know fairly well and who, in your opinion, truly lives his or her governing values and uses them to guide the decisions he or she makes in life.

Step 2: Use the questions provided below to gather information. Feel free to add your own questions as well.

Interview Questions

1. What are the top three things you value in life?
2. You appear to be a person who really lives your values. Has this been a conscious choice for you? If so, how did you make it one?
3. (Before asking this question, explain the concept of a clarifying statement.) If you had to write a clarifying statement for each of your top three values, what might they say?
4. Do you think that having a clarifying statement for each of your values would help you live them even better than you do now? Why or why not?

Food for Thought

1. Were you surprised by any of the answers you got? Explain.
2. What did you learn from your interviewee that you can apply to your own attempt to live in accordance with your values?

JOURNAL ACTIVITY

IDENTIFYING YOUR VALUES

Time to Make Choices

In this section, you read about making a list of your governing values. Now it's time to do just that. We'll provide you with some examples that will help get you thinking, and you'll take it from there!

Time Estimate

Approximately 15–20 minutes (or as long as you need)

Instructions

1. Find a quiet place where you won't be distracted. Consider playing some favorite music to help inspire you.
2. Using the samples listed below as a possible starting point, make a list of your governing values. There is no right or wrong number. You may want to set the list aside for a day or so and then come back to it and refine it or prioritize it so it feels manageable. Remember that these values are core to your belief system and should be what drives your choices and behavior.

SAMPLE VALUES:

Adventure, freedom, loyalty, balance, generosity, patience, beauty, gratitude, professionalism, compassion, health, quality, courage, honesty, respect, creativity, humor, responsibility, faith, integrity, teamwork, fitness, leadership, wisdom

YOUR VALUES:

Food for Thought

1. Was this a difficult activity for you to complete? Explain.
2. What makes these particular values so important to you?

JOURNAL ACTIVITY

IDENTIFYING YOUR VALUES

A Little Clarity, Anyone?

Okay, now it's time for the hard part! This activity will take you through the second step: clarifying your values. These statements will help you decide the "how" and "what" of your governing values. How will you live your life so that your values will be that driving force they should be? What specific behaviors will you display so that others, as well as you, will know you are a person who lives your values?

Student Materials

- Your list of values from the previous activity

Time Estimate

Approximately 15–20 minutes (or as long as you need)

Instructions

Step 1: Again, find a quiet place where you won't be distracted, and consider playing some of your favorite music to help "inspire" you.

Step 2: Review the sample clarifying statements below before you begin.

Step 3: On a "Values" planner page, fill out the spaces marked "Value" with the values you listed in the previous activity.

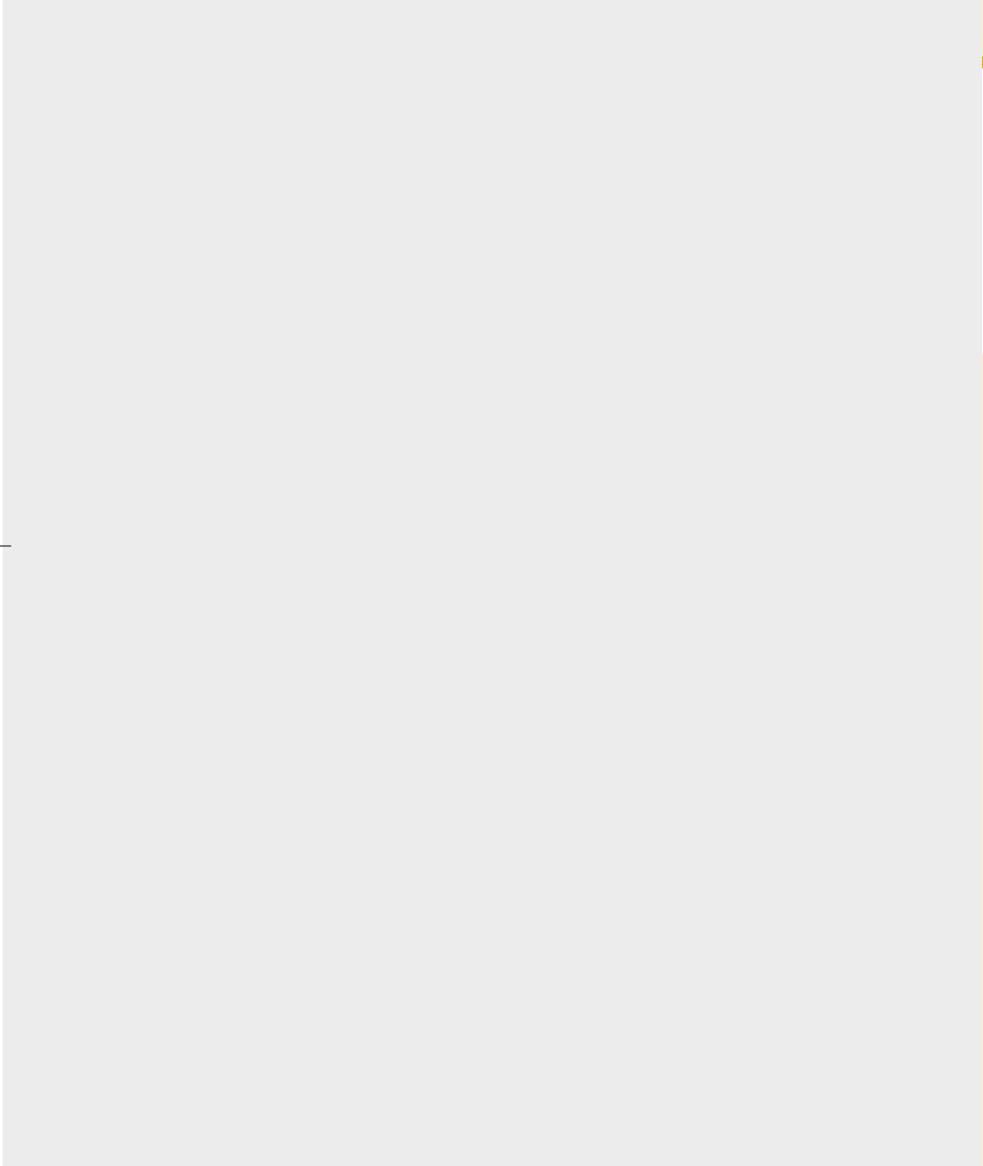
Step 4: For each of the values that you have identified, add a clarifying statement. Remember that they should be affirmation-type statements. You might find it helpful to write them in the first person as well. This may not be as easy as you think! You may want to put this aside for a day or so and then come back to it. Give yourself as much time as you need, but don't stress about it! Let it come from your heart, and you'll be headed in the right direction.

Values Planner Sample

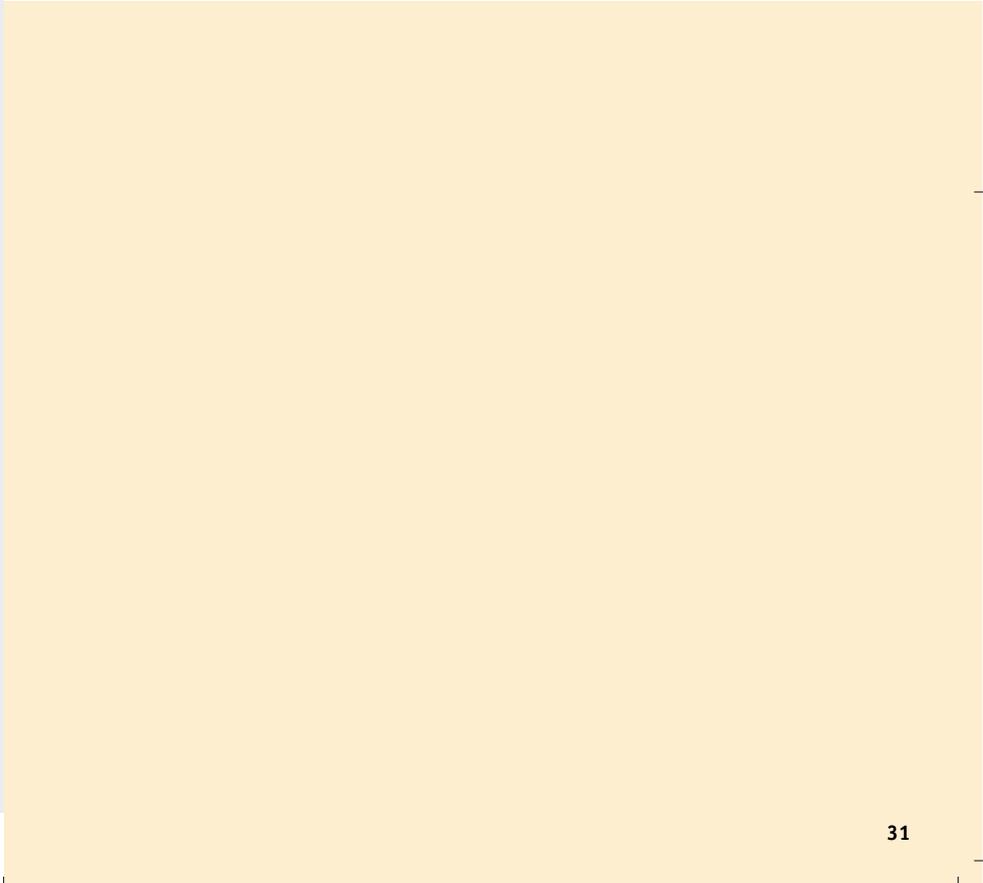
Values	
Value: Openness	
Clarifying statement:	I will talk to my wife about how my day went and how I'm feeling. I will also ask her about her day and involve myself in her interests.
Value: Well-being	
Clarifying statement:	I will get some sort of physical exercise every day. I will eat less fast food.

Food for Thought

- Record one or two of your values and their corresponding clarifying statements in the space below.
- How would living these values manifest itself to others? Do your clarifying statements necessarily have to match what others think it means to live those values? Why or why not?
- Is it possible that your values or clarifying statements might change over time? Explain.



SECTION 3 Setting Goals for Yourself



CHECK IT OUT!

SETTING GOALS FOR YOURSELF

Overview

Does even thinking about goals depress you? It can be that way for a lot of us. We set a goal with every good intention, and then it seems like we never reach it. So there must be something wrong with you then, right? You're weak, indecisive, lazy, too busy, too tired, too this, too that. Well, you're probably none of those things. You're just human, like the rest of us. We all get bogged down in the daily minutiae and find it difficult to accomplish some of the things we really want to do. Whether they're short- or long-term goals doesn't really matter.

As you move to the next tier of the Productivity Pyramid, you will look at goal setting from a different point of view. You'll get a new "spin" on what it takes to set and follow through on your goals. Hopefully, you'll find that it's not that depressing after all.

Time Estimate

It should take approximately 2 hours to complete this section's material.

Objectives

After successfully completing this section, you will be able to:

- Set goals and break them down into manageable chunks.
- Understand how the different roles you play in life may have an impact on your goals.
- Identify ways to Sharpen the Saw®, or practice personal renewal.

Activities

During this section, you will complete the following activities:

- **"X" Marks the Spot.** In this activity, you will make your own personal timeline and discover the vision you have for your life.
- **Off to See the Wizard, Part 1.** In this activity, you'll work through the Goal-Planning Wizard, using the Resource CD-ROM.
- **The Roles You Play.** This activity will help you identify the multiple roles you play in your life, as well as the relationships influenced by those roles.
- **Sharpen the Saw.** This activity will focus on one key role—the role of self—by asking you to brainstorm ideas for personal replenishment and fulfillment.

LISTEN UP!

SETTING GOALS FOR YOURSELF

Listening

FOCUS: Achieving Your Highest Priorities CD

Disc Two: Tracks 2–5

Time Estimate

30 minutes

Food for Thought

Goals. Sounds like a pretty dry subject, doesn't it? How hard can it be to set a goal anyway? It's not the setting part that's hard; it's the actual doing it. That's what we're here to help you do: learn how to follow through on those goals you set for yourself.

1. Think back on some of the goals you've set in the past. Did you attain them? Why or why not?
2. Sometimes people are referred to as being "goal-oriented." What does that mean to you? Does that describe you? Explain.

GETTING DOWN TO IT—PART 1

SETTING GOALS FOR YOURSELF

Dost thou love life? Then do not squander time; for that's the stuff life is made of.

BENJAMIN FRANKLIN—(from *Poor Richard's Almanac*, 1757)

Envisioning Success

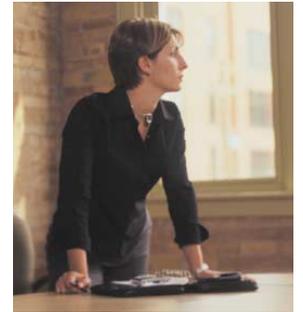
Timelines have many uses. You've seen them in history books on many occasions. They're a useful tool for getting a visual perspective of events—when they happened and how they relate to other events taking place in the space of time designated by the timeline. You can break a timeline down into very small increments or have it span centuries. It's an easy way to get an accurate picture of all kinds of events.

If you were to put a mark at the left side of your own personal timeline that represented your birth, and another mark somewhere to the right to indicate your possible death date (you might like to use a question mark!), it's fairly simple to determine where you'd put a mark for today.

Now you'd have three reference points: birth, or the beginning of your timeline; today; and death, or the end of your timeline. Everything from your birth to today is history. You can't change it, can you? You can look back and hopefully learn from your successes or mistakes, but you can't change anything. As you look from today forward, you have a wonderful sea of opportunity. You certainly don't have total control over your future, but you have the ability to heavily influence what happens.

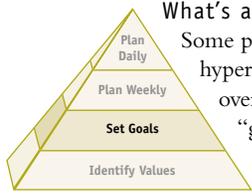
Having a clear visual picture of your life timeline can help you to envision your success. And while it is helpful to plot today's date on a life timeline to see how much time you have ahead of you, by putting your life events and goals on the timeline as well, you will have a better understanding of what you can actually achieve. It's a simple tool, but one you may want to revisit from time to time. Feel free to add things to your timeline to make it more detailed. Make it work for you!

Goals give you a surefire way to have a positive impact on your future. They help you set the vision for your life that you always knew you had. They're concrete, and you can design them to be realistic and attainable. If you view your timeline as a journey, you can see how goals might easily fit on that timeline. As you continue with this section, keep your timeline in mind. You'll find it helpful as you begin to work through the actual goal-setting process we will tackle next.



Before you begin setting goals for yourself, you must first envision yourself succeeding in whatever you set out to do.

(Image © 2003 FranklinCovey.)



What's a Goal?

Some people hear the word “goal” and immediately start hyperventilating. It sounds dry and dull—as well as overwhelming. In fact, the Oxford English Dictionary defines “goal” as “the object to which effort or ambition is directed; the destination of a journey.” Goals can be all of those ideas, desires, projects, and “somedays” that never seem to make it to the forefront of your life.

What if you called a goal “a dream with a deadline” instead? That may sound soft to you or even a little silly, but there are no “silly” dreams. Your dreams come from your passions and your imagination. Your dreams can tell you much about who you are and what you should be doing. Dreams are those nagging things that crop up over and over again. If you're drawn to something, then you were probably born to do it. When you're doing what you were meant to do, even if it's something as simple as taking up a new hobby, you feel how right it is. You feel better about yourself, and you feel like you're making a difference not only in your own life, but possibly in the lives of others as well.

Your goals will take different forms at different times in your life. When we think of goals, often the first thing that comes to mind is a huge, lofty “change the world” kind of accomplishment. In fact, there may be times in your life when just getting out of bed and putting in a decent day is as big a goal as you can handle. You don't have to start with “change the world” goals. Take time to really understand what's important to you, and let your dreams and goals flow from your values.

If your goals are value-driven, you'll know they are yours. Don't set goals based on what others think you should be doing. The effect will probably be much the same as when Benjamin Franklin added humility to his list of values. If you're not completely committed to a goal, you very likely won't end up achieving it.

Envisioning success is not just about your timeline and your dreams. Yes, those things will help you along the way, but the clear path to success is paved with specifics—and it's the specifics that help turn your dreams into reality. You have to catch the vision and keep the vision, or your goals will continue to fall by the wayside and remain “somedays.” Once you begin to see goals as enriching, empowering, and encouraging rather than overwhelming, unrealistic, and boring, you're on your way! Let's take the next step toward getting there.

The “Goal Planning” Tool

The indispensable first step to getting the things you want out of life is this: decide what you want.

BEN STEIN—(actor and former Presidential speechwriter)

We have designed a tool that will help you get your nebulous goals organized and, most importantly, written down. To the right is the example of Janine's goal that was discussed in the audio CD.

On the tool, you can see the first heading is entitled, “Value/Mission/Role (why?).” Janine's goal is driven by her values of compassion and generosity. This is the “why” of the goal. (In these materials, we don't develop a Personal Mission Statement®, but if you're interested in doing that, there's a great wizard on your Resource CD, as well as on the FranklinCovey Web site at www.franklincovey.com.) It's not unusual for goals to be driven by your mission or your roles (which we'll be discussing in just a bit); in fact, your values, mission, and roles should be the focal point of your life. If you live your life through them, you will find it much easier to stay on your chosen path. The next heading is the “what?/when?” of the goal. Janine has chosen to develop a communication plan for her team, but she hasn't set a deadline yet. Right now, this goal is only a dream for Janine. Until she sets a deadline, she likely will not move forward very quickly. Sometimes it's hard to put a deadline on a goal until you know exactly what it's going to take to accomplish it, so keep that in mind as you set your own.

Goals

Goal Planning

<p>Value/Mission/Role (why?):</p> <ul style="list-style-type: none"> • Teamwork • Professionalism <p>Goal (what?/when?):</p> <p>Develop a communication plan for my team by: (date)</p>													
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%; text-align: left; border-bottom: 1px solid black;">Step(show?)</th> <th style="width: 20%; text-align: left; border-bottom: 1px solid black;">Deadlines</th> </tr> </thead> <tbody> <tr> <td>Analyze audiences.</td> <td></td> </tr> <tr> <td>Determine message types.</td> <td></td> </tr> <tr> <td>Choose media/channels for message delivery.</td> <td></td> </tr> <tr> <td>Determine frequency.</td> <td></td> </tr> <tr> <td>Obtain manager buy-in.</td> <td></td> </tr> </tbody> </table>		Step(show?)	Deadlines	Analyze audiences.		Determine message types.		Choose media/channels for message delivery.		Determine frequency.		Obtain manager buy-in.	
Step(show?)	Deadlines												
Analyze audiences.													
Determine message types.													
Choose media/channels for message delivery.													
Determine frequency.													
Obtain manager buy-in.													

Before you begin setting goals for yourself, you must first envision yourself succeeding in whatever you set out to do.
(Image © 2003 FranklinCovey.)

GETTING DOWN TO IT—PART 2

Here are four goal-setting tips that will help you as you work through your “Goal Planning” pages.

1. Write it down.
2. Give it a deadline.
3. Break it down into manageable chunks.
4. Commit.

We’ve talked about how important it is to write down a goal and to give it a deadline. That’s what makes your goal begin to feel real. Breaking it down into manageable chunks makes it less overwhelming. Those “change the world” goals will no longer feel unattainable. Finally, you will need to make the commitment to yourself (and possibly to others) that you are going to follow through with your goal. If you’ve completed the first three steps of the goal-setting tips, your commitment to the goal is probably already in place, so you’re ready to go for it!

When you envision your success through your goals, you will probably find they are related to a “role” in your life. For example, if you have set a goal to take a class in a new technology, that goal relates to your role of computer technician. If you’ve set a goal to become a trained crisis-hotline worker, that goal relates to your role as a community volunteer. Never given much thought to the roles you play? Let’s take some time to do just that.

SETTING GOALS FOR YOURSELF

Roles: Your Most Important Relationships and Responsibilities

It’s been said that “All the world’s a stage,/And all the men and women merely players./They have their exits and their entrances;/And one man in his time plays many parts” (William Shakespeare, *As You Like It* 2.7, 147–150). How many “parts” do you play? Do you feel like you’re a “one-man” or “one-woman band”? You don’t have to feel that way. Let’s take a look at some of the roles you play in your life and how they relate to your goals.

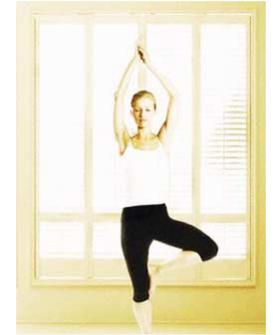
When you examine your values, you may see that many of them can be directly tied to a role, or relationship, in your life. For instance, if you value community service, you are probably a very good neighbor or citizen (or at least strive to be!). If you value family, you are probably close with yours or are starting one of your own. If you value education, you may be a student or a teacher. Within this framework, can you see how your values drive your goals and how your goals can be driven by your roles?

So, who are the most important people associated with each of your roles? Is there only one person per role? It depends on how you label the role. If you have defined one of your roles as “family member,” you will have several people associated with that role. You may be a spouse or partner, a son or daughter, a father or mother, etc. These are the specific relationships that have to be strong in order for you to be effective in your role as a family member.

There’s one role many of us don’t think of when trying to determine our roles. Interestingly enough, it’s the most important role of all: the role of self. That’s right—you! You have to make time to replenish your energy and to see that your own needs are met. After all, if you neglect to take good care of yourself, how can you possibly have the drive and energy to take care of your responsibilities in your other roles? We refer to this need to spend time on personal replenishment as “Sharpen the Saw.”

SHARPEN THE SAW® STORY

A man is hired to cut down some trees in a forest. It’s his first day on the job. He’s a very eager guy, so he cuts down 12 trees that day. Everyone congratulates him and gives him “high fives.” He’s the best tree cutter ever. On the second day, he works just as hard. He cuts down nine trees.



Sharpen the Saw by cultivating habits that stimulate and rejuvenate your body and mind.

When he leaves that day, he looks a bit down, so a co-worker asks him what's wrong. He says, "I don't know. My productivity's kind of off today. I don't get it." His co-worker responds, "Everybody has an off day. It'll be better tomorrow."

The man goes home and strategizes all night. He decides he won't take any breaks, not even to eat. On the third day, he works like crazy, but only ends up cutting down six trees. He's ready to quit! Walking back to his truck, he runs into a man who has been on the job for a very long time. The veteran tree cutter asks him what's wrong. The new guy tells him he doesn't understand why, no matter how hard he works, he's not cutting as many trees. As the older, wiser tree cutter walks off, he says, "Well, have you stopped to sharpen your saw?"

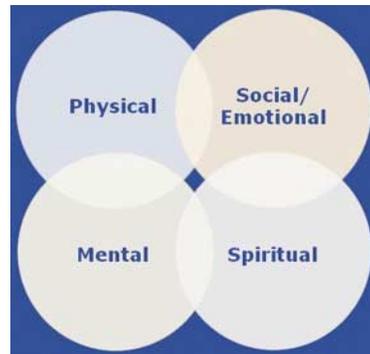
Your Role of Self

If your personal saw is dull, you can't be effective in any other role. It's that simple. You've most likely experienced this already. If you can't remember the last time you spent time alone doing something to renew yourself, then you probably can remember feeling like you aren't doing such a great job at being a good family member or neighbor.

There are four areas of renewal that need to be regularly attended to: physical, social/emotional, mental, and spiritual. Each of these areas has a huge range of opportunities for you to explore. Don't lock yourself into thinking they only include exercising, going to a movie, taking a class, or going to a worship service. Those activities don't fit into everyone's life. Make this concept work for you in a way that suits you best.

You may be thinking, "Great! Just one more thing I have to do!" But this process isn't about adding more things to your already hectic schedule. Using Joe from the previous section as an example, let's take a closer look at how he makes time to Sharpen the Saw. Joe is very athletic, and spends a lot of time running and playing golf. He is also a parent and a spouse. His work takes him out of town fairly often, but it's a necessary part of his job, especially if he wants that promotion he's been working toward. He also likes to devote some time to his community, and therefore coaches a youth soccer team.

Sounds like a lot, doesn't it? Here's what he does to simplify it all. The sports he's involved with are perfect for involving another person, so he often invites his wife to



You need to rejuvenate yourself physically, socially/emotionally, mentally, and spiritually. This will give you the energy it takes to perform in your other roles.

(Image © 2003 FranklinCovey.)

play golf with him, or has one of his children accompany him on a run. When he needs some solitude, he makes it a point to run by himself in a place he finds peaceful. By running or playing golf with someone else, he's actually devoting time to more than one dimension: the physical and the social/emotional. When he runs alone and takes time for himself spiritually, he encompasses both the physical and spiritual dimensions. There can easily be crossover between dimensions.

While he's on the road, Joe often spends his evenings catching up on professional periodicals and journals, as well as reflecting on his goals and direction in life. This keeps him mentally sharp, as well as allowing him time for personal introspection. Doing this while he's away from home allows him to spend more time nurturing relationships and "sharpening the saw" in other ways when he is home.

Joe's community involvement not only gives him pleasure, but it also enables him to interact with neighbors and friends he might not otherwise see on a regular basis. Depending on what he's spending his time on at any given moment, he could be hitting a combination of any of the four dimensions.

There are many ways to find the crossover and make it easier on yourself. When you Sharpen the Saw in all four dimensions on a regular basis, you will feel a greater sense of balance. When the four dimensions intersect, you'll have more focus, and you'll be building stronger relationships. Finding that balance in all of your roles over the course of a day can be difficult, but it's entirely possible to create balance over the course of a week. That's the next step in the process—Plan Weekly—and what you'll tackle next.

Food for Thought

1. How does where you are in your life right now affect the goals you set? How helpful is it to have a "timeline" perspective? Does it help to open up your vision?
2. Is setting goals and following through on them difficult for you? Explain.
3. When it comes to Sharpen the Saw, which dimensions are you already good at? Where can you improve?

SELF-ASSESSMENT ACTIVITY

SETTING GOALS FOR YOURSELF

“X” Marks the Spot

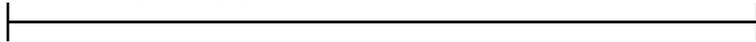
At the beginning of this section, you read about the concept of your personal timeline. Now it's time to actually create your own. In this brief activity, you will be creating your own personal timeline by first actually making your timeline, then writing down some information that will get you thinking as you move into the other activities in this section.

Time Estimate

10 minutes

Instructions

Step 1: On a piece of paper, make a horizontal line similar to the one below.



Step 2: At the far left-hand side, mark the date of your birth. Assuming the far right-hand side is the date of your death, make a mark on the timeline where you are today.

Step 3: Under the timeline you've made, write a brief introduction of yourself as you are today. Include information about all aspects of your life. Here's an example:

“Hello, I'm Maria, and I'm 25 years old. I am currently a full-time college student majoring in graphic design. I also work part time as a graphic-design assistant for a major ad agency. I'm married, but have no children yet. I enjoy rock climbing and drawing almost anything.”

Step 4: Using the same type of format, write an introduction of yourself from the perspective of 10 years ago. Here's an example:

“Hello, I'm Maria, and I'm 15 years old. I'm a sophomore in high school and am really looking forward to turning 16 so I can get a part-time job and my driver's license. My favorite subject in school is art. I am hoping to attend college out of state when I graduate.”

Step 5: Finally, write an introduction of yourself projecting 10 years into the future. Here's an example:

“Hello, my name is Maria, and I'm 35 years old. I am married and have two children. We live in Oklahoma, where I am employed as a free-lance graphic designer. I have the best of both worlds, doing work I love from an office at home. Right now I am working on building my portfolio by taking on clients far different from the ones I've had in the past. I am planning on going back to school to sharpen my skills next year when my youngest starts first grade.”

Food for Thought

1. What did you discover from this activity?
2. Ten years ago, did you envision where you are today?
3. Are you doing the things and being the type of person you've always wanted to do and be? Why or why not? What's holding you back?

SELF-ASSESSMENT ACTIVITY

SETTING GOALS FOR YOURSELF

Off to See the Wizard, Part 1

In your audio set, you'll find a Bonus Resource CD-ROM. In this activity, you'll be using that CD-ROM to work through the Goal Setting wizard. This wizard will help get you started on setting a goal, as well as give you food for thought.

Materials

- Bonus Resource CD-ROM
- Printer

Time Estimate

30 minutes

Instructions

Step 1: Insert the Bonus Resource CD-ROM into your computer.

Step 2: After the introduction has finished and you have accepted the licensing agreement, hover your mouse pointer over "Life-Leadership Wizards" in the toolbar at the top of the page. Click "Goals."

Step 3: Proceed through the wizard as directed.

Step 4: After completing the wizard, you may want to print out additional Goal Setting tools from the supplied PDF file to use on other goals.

Food for Thought

1. Was setting this goal difficult for you? Why or why not?
2. How will you implement this skill in your daily life?

SELF-ASSESSMENT ACTIVITY

SETTING GOALS FOR YOURSELF

The Roles You Play

In this activity, you will spend some time determining what roles you play each day. Next, you'll identify the specific people you associate with each role. Remember, the strength of your relationships is often a measure of your success.

Time Estimate

15 minutes

Instructions

Step 1: Make a list of no more than seven roles you fill. Don't forget to put yourself as one of the roles! You may find it helpful to make some of your roles general in nature, such as "family member" rather than "father," "son," or "uncle." Make sure to list a variety of roles, both personal and professional.

Step 2: Next to each role you've listed, make a list of the specific people associated with each role.

Food for Thought

1. Was it difficult for you to limit yourself to only seven roles? Why or why not?
2. Which roles and relationships are you doing a good job at strengthening? Are there specific things that make it easier to be successful in these roles?
3. Are there roles you are neglecting? What can you do to change that?
4. Are you able to see how the strength of your relationships can influence your general success? Explain.

SELF-ASSESSMENT ACTIVITY

SETTING GOALS FOR YOURSELF

Sharpen the Saw

Now that you've determined your roles, it's time to focus on the most important one: you! In this activity, you'll begin to set up a plan for ways you can Sharpen the Saw. Personal renewal is the key to keeping a sense of balance in your life. You can't nourish the other relationships in your life if you aren't taking care of yourself first.

Time Estimate

15 minutes

Instructions

Step 1: On a piece of paper, make four columns. Label them "physical," "social/emotional," "mental," and "spiritual."

Step 2: Under each heading, list ways you might renew yourself. Keep them simple, and be sure to choose things you really have an interest in. If you include things you know you won't do, you won't be moving forward.

Step 3: Next, look for ways you might be able to combine activities to bridge more than one dimension. Are there ways you might build a relationship while renewing yourself?

Step 4: Set an appointment for yourself for when you will actually follow through on the things you've chosen.

Food for Thought

1. Did you find there are things you are already doing to renew yourself? How does doing those things make you feel?
2. If you struggle with finding renewing activities, what can you do to make it easier?
3. What results would you like to see from making Sharpen the Saw a part of your daily life?

SECTION 4 Giving Yourself a Weekly Plan

CHECK IT OUT!

GIVING YOURSELF A WEEKLY PLAN

Overview

You've probably heard the phrase "daily planning" many times. It's all about scheduling your day, your hour—even your minutes. Daily planning is a good thing, but if you look at your life from only that single perspective, you are opening yourself up to problems. Aren't your days fairly changeable? Most people's are. It's easy to be blindsided by the urgent, and then your entire day is off schedule! Planning from a weekly perspective will help you step back and better manage the "big picture."

Time Estimate

It should take approximately 2 hours to complete this section's material.

Objectives

After successfully completing this section, you will be able to:

- Choose the "big rocks," or most important priorities, in your week and fit them into your weekly schedule.
- Use the Weekly Compass® as a tool to help guide your decisions during the week.
- Apply the three steps involved in creating a weekly planning process.

Activity

In this section, you will complete the following activity:

- **Off to See the Wizard, Part 2.** Using the Resource CD-ROM, you will work through the Compass Wizard. After reviewing some of the concepts you learned about your roles, you'll fill out a Weekly Compass.

LISTEN UP!

GIVING YOURSELF A WEEKLY PLAN

Listening

FOCUS: Achieving Your Highest Priorities CD

Disc Two: Track 6

Time Estimate

25 minutes

Food For Thought

1. In what ways does an artist or a photographer use the concept of perspective?
2. Can you think of ways in which you might use the same concept in your daily life? What are they?

GETTING DOWN TO IT—PART 1

GIVING YOURSELF A WEEKLY PLAN



The Weekly Perspective

Have you ever been taking a picture and thought, “If I just step back a little, I can get a perfect shot?” Photographers are constantly moving around, getting their shots from all different angles or perspectives. They know that if they move in really close, they’ll get the fine detail they’re looking for.

Sometimes they seek a great panoramic view from a distance, while other times they want something in between. They’re always looking for the perfect balance.

It can be difficult to find that balance in all of your roles over the course of just a day—the close-up view—but if you pull back and look at them from the “in between” view, it’s much easier.

Most time-management tools and techniques concentrate on daily planning, and at first glance, that seems to make sense. The day is the smallest complete, natural unit of time: You can face the new day with a new set of tasks and appointments; you can plan your day, set daily goals, schedule appointments, and prioritize your activities. When the day is over, you can take all the things you didn’t get done and start all over again! Nothing gets lost in the cracks.

The problem with this kind of planning is that it’s similar to walking down the street with blinders on. You can only see what’s directly in front of you! You are easily blindsided with the urgent and pressing “stuff” that comes your way. Now you’re forced into prioritizing crises. Not exactly what will help you feel more balanced, is it? The approach of daily planning is to help you Put First Things First; but, in reality, daily planning keeps you focused on the urgent. Weekly planning allows you to pull back and plan from a Quadrant II mindset. Remember, Quadrant II is the place you want to be as often as possible. Weekly planning helps you close the gap between the panoramic view and the close-up view.



If you adhere to a weekly plan that factors in all of your roles, you will feel accomplishment and inner tranquility.

Gaining Perspective: A Testimonial

You must look within for value, but must look beyond for perspective.

DENIS WAITLEY—productivity speaker and consultant

“My profession was consuming most of my time, but not any longer. I feel as if a great weight has been lifted off my shoulders and I’m enjoying life again. I’m getting more done at work and still having plenty of time for my other roles. My life is regaining a sense of balance.

“I’m discovering a significant amount of quality time. Before, I was always saying, ‘There just aren’t enough hours in the day, enough days in the week. I’ve got too much to do.’ I fall back into old habits sometimes, but I have the comfort of knowing that I’m anchored and balanced and I can adjust very quickly. There are rushes, work crunches that just won’t wait, but the reward is that I can then block out some time for myself and know, really know, that this is as important as any Quadrant I client emergency or anything else. Then I realized that the point was not to schedule every little thing, but to work on first things first.

“The most noticeable change has been with my children. Mondays were always hectic days, with my daughter going horseback riding and my son off to soccer practice and the whole family trying to get dinner in between events. In organizing my week, I suggested to my wife that we make this a special time with the kids, each taking one child and going out to eat before or after the event, and that we put our focus on the child rather than the rushing around. Last Monday, after working with the plan for two weeks, my son took my hand as we were leaving the fast-food restaurant on our way to soccer practice. ‘Monday’s my favorite day of the week, Dad,’ he said as we walked to the car. ‘I don’t even care which of you is with me. I just like to talk.’”

In our context, the panoramic view is your values and goals. They provide the overarching structure to your life. The man in this story realized how much he valued his family, and made changes to his life because of that. When you step



Finding a sense of balance in all of your many roles will help you be more attentive and focused on each one.

back and look at your life through your values and goals, you have a much larger view of where you are headed. You see the “big picture.” The close-up view, on the other hand, is your tasks and appointments. These are the daily things that can be fairly changeable.

With a midrange focus, you get the weekly perspective. It’s through the weekly perspective that you link the long-range view with the daily detail and achieve balance in your more important roles. The weekly planning level is close enough to be relevant, but distant enough to give you some space to make wise decisions about how to use your time. It’s another way of looking at the pyramid: each tier brings you closer to that detailed, very focused viewpoint.

SELF-ASSESSMENT ACTIVITY

big rocks metaphor. To review, there is a container that represents your time. You put rocks into that container that represent your activities. The big rocks represent your Quadrant II activities—your most important, or first, things. The small rocks, or gravel, are all the other little things that take up your time. Typically, the majority of us schedule those little things first and don't have time for what's really important. The point of the metaphor is that if you put the big rocks in first, there's still room for most of the small rocks.

Your big rocks are your most important weekly priorities. A key question to ask yourself as you review your role and choose your big rocks is: "What is the most important thing I can do in this role this week that would have the greatest positive impact?" That's a pretty powerful question. If you live your life with that question at the forefront of your weekly planning, how can you go wrong?

SCHEDULE THE WEEK

The third step to weekly planning is to schedule your week. Put those big rocks in first, then fill in the rest. The power of weekly planning is to schedule the important big rocks first, before the small rocks fill up your week—and they will! Your big rocks can be translated into appointments and tasks, or become an area of focus for the week. The ones that aren't "schedule-able," such as "Be a good listener," stay on your Weekly Compass card as a reminder.

Now that you've worked through the weekly planning process, make a commitment to yourself to do it every week! Twenty to thirty minutes a week is a very small investment to make toward such huge dividends. The process is simple. All you need to do is follow through on it. Weekly planning is a habit that will consistently drive your vision of success toward reality.

Food for Thought

1. What do you do when you feel torn between different roles in your life, such as work and family, or community contribution and personal development? What kinds of things can you do that would help you prioritize and make commitments and keep them when it comes to making the tough choices?
2. Suppose you're going through your day and an unexpected opportunity comes up. How do you know whether it's best to respond to the opportunity or stick to your plan?
3. In what ways can you see how weekly planning could actually simplify your life and help you feel more balanced?

GIVING YOURSELF A WEEKLY PLAN

Off to See the Wizard, Part 2

In this activity, you will use the Bonus Resource CD-ROM to work through the Compass wizard. This wizard will help you get started on filling out a Weekly Compass card.

Materials

- Bonus Resource CD-ROM
- Weekly Compass card

Time Estimate

30 minutes

Instructions

Step 1: Insert the Bonus Resource CD-ROM into your computer.

Step 2: After the introduction has finished and you have accepted the licensing agreement, hover your mouse pointer over "Life-Leadership Wizards" in the toolbar at the top of the page. Click "Compass."

Step 3: Proceed through the wizard as directed.

Step 4: After completing the wizard, you may want to print out additional Weekly Compass cards from the supplied PDF file to use in the coming weeks.

Food for Thought

1. Was filling out the Weekly Compass card difficult for you? Why or why not?
2. How will you implement this planning skill in your life?

SECTION 5

Carrying Out Your Daily Plan

CHECK IT OUT!

CARRYING OUT YOUR DAILY PLAN

Overview

In the previous section, you learned about a weekly planning process that helps you keep things in order and achieve balance in your life. You also familiarized yourself with a weekly planning tool called the Weekly Compass, which helps you balance your roles by scheduling “big rocks” each week.

While it’s great to feel balanced and organized, it will only get you so far. Once you have a weekly plan in place, it’s time for the rubber to meet the road. In other words, you have to do something about it! That’s where daily planning comes into play. In this section, you’ll learn about a three-step daily planning process that will help you set in motion your weekly plans and goals.

Time Estimate

It should take approximately 1 hour to complete this section’s material.

Objectives

After successfully completing this section, you will be able to:

- Understand how daily planning is the vehicle for making your weekly plans and goals happen.
- Take the three steps in a daily planning process that will allow you to accomplish your highest priorities.

Activities

In this section, you will complete the following activities:

- **Get Real!** In this activity, you’ll schedule and review your daily appointments, and then make a list of tasks that can realistically be completed during your day.
- **The ABCs and 123s of Prioritizing.** This activity will have you prioritize your task list from the previous activity by quickly assigning an order and a value to each of your tasks.
- **Act or React.** In this activity, you will give your gut response to 10 different statements, tally your score, and then determine if you are more prone to act or react when it comes to making decisions.

LISTEN UP!

CARRYING OUT YOUR DAILY PLAN

Listening

FOCUS: Achieving Your Highest Priorities CD

Disc Two: Track 6 (You've already listened to this track, but this time, listen to it with an ear toward ideas for daily planning rather than weekly planning.)

Time Estimate

20 minutes

Food for Thought

If you don't design your life, someone else will. It's that simple. Daily planning pulls you out of the passenger seat and places you firmly in the driver's seat of your personal and professional life. Daily planning helps you determine and act on what is most important to you each and every day. Please write your responses to the following questions:

1. Do you think Michelangelo had a plan when he painted the ceiling of the Sistine Chapel? Why or why not?
2. Do you consider your life a "masterpiece"? How might having a daily plan bring more value and purpose to your life?
3. When was the last time you began your day with a firm plan in mind? How did it feel? What did you accomplish?

GETTING DOWN TO IT—PART 1

CARRYING OUT YOUR DAILY PLAN

You've made it! You're on top of the world! Okay, we got a little carried away there, but you are on top of, or at the pinnacle of, the Productivity Pyramid—Plan Daily. Take a moment to look down from your lofty perch and realize how far you've come.

First, you identified your values and determined that there were some areas of your life in which you had a passion to go further, reach deeper, or improve upon.

Next, you set goals that helped you envision how you would attain success in those areas. You then learned that adopting a weekly perspective allows you to make room for those goals and plan a balanced life. Now you've reached the top of the pyramid, with the firm base you've built thus far supporting you.

Three Steps to Daily Planning

Your success in all you've done until now points to and depends on this last crucial step: planning daily. This is where you make things happen, and it's all up to you. We'll walk you through each step, point out some helpful tips, and then offer you some ideas on how you can stay true to your plans.

STEP 1: CHECK TODAY'S APPOINTMENTS

Appointments are fixed commitments to yourself or others where you have promised to devote a certain amount of your time. Since you've already blocked out time in your schedule for these appointments, you need to plan the remainder of your daily tasks around them. Therefore, it's logical to start each day by checking your appointments.

As you can see from the Appointment Schedule in the graphic on the following page, Melanie has committed her time to several things throughout the day. She has a dentist appointment from 8:00–9:00 a.m., a sales meeting from 1:00–3:00 p.m., a yoga class from 5:30–6:30 p.m., and a dinner date with her husband Anthony from 7:30–9:00 p.m. As Melanie reviews her appointments, she remembers that she'll need approximately half an hour before her meeting begins to review sales forecasts and make any last-minute adjustments to her handouts. She therefore blocks that time



You'll feel more triumphant about your important achievements when you follow through on your plan each day.

(Image © 2003 FranklinCovey.)

out on her appointment schedule so she doesn't forget. She's glad she remembered this, because she had planned on calling her close friend Stan to wish him a happy birthday during that time.

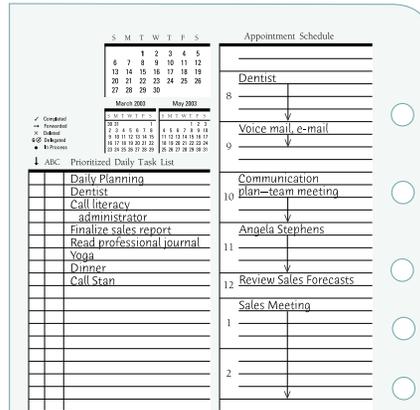
Imagine what might have happened if Melanie had not reviewed her appointments. What might have been the result if she had forgotten she needed extra time to prepare for her meeting, and instead called her friend Stan? She might have realized she needed review time at the last minute, scurried to make updates, and possibly even arrived late at the meeting. Sound familiar? Checking your appointments each day allows

you to make further adjustments to your time commitments so you don't get overbooked and operate from a mind-set of urgency, as was discussed in Section 1. It also allows you to be sufficiently prepared to meet your commitments.

Now think a little bit more about Melanie's yoga appointment and her dinner date with Anthony. Where do you think those appointments might have originated? They most likely came from the Weekly Compass and weekly planning. Under her Sharpen the Saw role, Melanie planned to attend yoga class three times during the week. Under her role of "spouse," she planned to have dinner with her husband. It just so happens that two of Melanie's goals were to increase her fitness level and improve her relationship with her husband. And it just so happens that two of the values she identified as driving forces in her life are health and family. Pure coincidence? Not at all. That's pure Productivity Pyramid.

STEP 2: MAKE A REALISTIC LIST

Take a look at the "to do" list pictured on the following page. The person who made this list is either from a superhuman species, or else he or she needs to see a good therapist. While you most likely agree that this list is unrealistic, you've probably made one like it several times in your life. When making a daily list, many people have the tendency to fill the list with everything and anything they can think of. If you do this, you'll begin the day already feeling overwhelmed and out of control. The portion of the *Focus* CD you listened to for this section offered guidelines when



After factoring in appointments, the time you schedule for accomplishing other tasks should not be more than 65 percent of your available time.
(Image © 2003 FranklinCovey.)

making a task list. Once you've checked your appointments for the day, determine the number of remaining hours available. Let's take a look at Melanie's appointments again. If you add up the hours for her appointments (figure in an extra 15 minutes for meeting-prep time, a half hour for driving to and from yoga, and an extra hour for grooming and driving to and from her dinner date), she has already committed over seven hours of her time for the day. Now, let's say Melanie estimates that she has approximately 12 productive hours in the day. That leaves her with a little less than five hours with which to work.

Because things do arise during the course of the day, Melanie needs to leave some wiggle room for unforeseen events—as do you. The rule to remember is to never schedule more than 65 percent of your available time. Sixty-five percent of Melanie's five hours leaves her with a little over three hours for tasks. From there, Melanie makes a realistic list of tasks she feels she can complete during those three hours. (See the Prioritized Daily Task List column in the graphic of Melanie's schedule on the previous page.)

At first glance, it looked as if Melanie had only five and a half hours of committed time, which would leave her with six and a half hours for tasks. Remember, looks can be deceiving! Following the process will result in a shorter, more realistic list that more accurately represents your priorities for the day.

STEP 3: PRIORITIZE—ABC, 123

After you have a realistic list of daily tasks to work with, it's time to prioritize the list. Prioritizing allows you to determine the value and order of the items on your list, and keeps you from spending time on things you don't value. It prevents the most important events in your life from being victimized by less important activities, and gives you an excellent opportunity to determine on where and on what you need to focus your attention and energy.

Prioritizing your list is as easy as ABC, 123. The As, Bs, and Cs represent the value of each task, and the 1s, 2s, and 3s represent the order or sequence in which you will accomplish those tasks.

The As represent tasks of the highest importance. It's helpful to think of As in this context: "If nothing else happens today, I am going to make sure I get the As done!"

TO DO LIST

Finish novel	Go to gym
Call Kaita	Clean basement
Return videos	Fix bike
Pay gas bill	Buy air filter
Balance checkbook	Meet with realtor
Lunch with Dave	Wash car
Plan swim party	Get a haircut
Schedule team meeting	Spray weeds

If you fill your task list with too many things to do, as in this example, you're setting yourself up for failure. Keep it simple and realistic.

GETTING DOWN TO IT—PART 2

The Bs represent tasks of medium importance. These are tasks that need attending to, but don't represent the significant or weighty things that are of highest value for today. And the Cs? You guessed it: they're not very important at all! Hit the Cs if—and only if—you have some leftover time after completing the As and Bs.

Don't sit and stew over your list. Assign a value and order relatively quickly, and move on. You'll be able to sense what is truly important. But, as the audio CD pointed out, don't make everything an A, or nothing will be an A.

Assigning each task a number completes and fine-tunes your plan for the day. Go first to the As and establish a sequence for those tasks, then to the Bs, and finally to the Cs. Once you've done this, you can easily see not only the value of each of your tasks, but also the order in which you'll complete them.

In your listening assignment, you learned the importance of avoiding the “fun, fast, friendly” trap as you go about accomplishing your tasks for the day. Your A1 task is probably something that is going to take some time and effort to complete, and most likely won't tickle your funny bone. You'll have the urge to pass it over and look at A2, B1, and so on, until you find something to complete that's fast, fun, and friendly. Don't do it—those are usually the C tasks! It takes great discipline to do the important things first, but if you find that discipline, you'll feel a great sense of accomplishment at the end of the day when you see all of your important tasks checked off.

Tips for Daily Planning

Always have a plan, and believe in it. Nothing happens by accident.

CHUCK KNOX—former NFL head coach

Now that you're familiar with the daily planning process, you might be wondering where, when, and how long it takes to do it. To answer those questions, here are three tips to help you with your daily planning.

When? The best time to do your daily planning is either early in the morning or in the evening before bed. The key is to do it before you begin your day. If you wait until you're halfway through the day to start planning, what good will that do? If you always list “Plan daily” as one of your tasks to complete, you'll never forget.

Where? Try to find a place that is free from noise and distractions—someplace where you can feel at ease and think. Consider turning down the lights, plugging in your desktop waterfall, and putting on some soothing music. Create an environment that will allow you to relax, think, and plan.

How Long? Daily planning shouldn't take you longer than 10 minutes at the maximum. Keep it quick and to the point.

CARRYING OUT YOUR DAILY PLAN

The best-laid plans of mice and men often go awry.

translated from the original poem “To a Mouse” by ROBERT BURNS

Sticking to Your Daily Plan

It's a fact of life that things will not always work out the way you planned them. Each day brings unexpected challenges, new opportunities, and reasons and excuses for not doing what you planned to do. If your idea of being focused and achieving your highest priorities is to bulldoze your way through a list of scheduled appointments and tasks no matter what, you're setting yourself up for almost inevitable frustration. The nature of most days will violate that expectation. You're driving into unfamiliar terrain each day, and although your daily plan is helpful, your ability to navigate and deal with what comes your way depends on your solid foundation—your values. Whatever detours arise, you can depend on your governing values to keep you moving in the right direction.

Throughout the day, many different things will act on you as you make choices pertaining to your daily plan, such as:

- The urgencies of others.
- Your own expectations of yourself.
- Others' expectations of you.
- Your short-run satisfactions.
- Your long-term goals.
- Your conscience.
- Your wants and needs.

These factors, as well as others, are acting upon you with each choice you make throughout the day. It's important to remember that when the moment of choice comes—a moment that may deter you from your plan—you need to step back for a moment and decide whether or not the decision you are about to make supports your governing values.



Your governing values will help keep your daily plan focused on the things that are most important to you, such as spending time with family.

(Image © 2003 FranklinCovey.)

We often react to people and circumstances around us and allow them to control us. You may be saying, “I’m my own boss. Nobody controls me,” but see if any of the following statements sound familiar:

- “It’s Camille’s fault I didn’t get it done.”
- “Mark makes me so mad. He just frustrates me.”
- “I can’t work when the weather is like this.”
- “If Steve hadn’t shown up, I would have been on time.”

Let’s go back to Melanie and see how she might handle some moments of choice.

Thirty minutes before Melanie is getting ready to leave work, her boss informs her that the network is down again. Melanie is a very competent network administrator. She remembers that when the system went down last time, it took several hours to get it back up. She glances at her watch and realizes that if she doesn’t leave in the next half hour, she’ll miss her yoga class and possibly even her dinner date with her husband. There are a few ways she can handle this moment of choice:

1. Melanie turns to her boss and says, “When I stayed late last time, it took several hours to get the system up and running. I know you’re aware that I have plans tonight, but since I’m the only one here, I’ll have to cancel them and stay.” Melanie’s boss thanks her and says she is sorry about ruining her plans for the evening.
Melanie calls her husband and says, “She did it to me again. She really frustrates me sometimes. Doesn’t she know I have a life? She’s making me stay here to fix the system, and now our night is pretty much shot. It’s all her fault.” When Melanie arrives home that evening, she is emotionally drained and frazzled because her plans did not work out.
2. Melanie tells her boss that she needs to glance over her schedule for a moment. When she looks at her Weekly Compass, she is reminded that attending yoga class and having dinner with her husband were two big rocks she had scheduled for the week. Melanie knows that good health is one of her governing values, and keeping in shape is one of the goals she has set for herself. She looks at her schedule for the next afternoon and sees that she would have some time then to make up the yoga class. Melanie also knows that improving her relationship with her husband is an important goal to her. She is very aware that spending quality time with family is one of her main values.
She turns to her boss and says, “I understand that you need my help at this moment, and I am willing to help, but I can only stay for one extra hour. I have a date with my husband that I just can’t miss. I’ll help you make some calls to find someone to cover for me when I leave, if you like.” Melanie’s boss agrees

that she shouldn’t miss her date and that she will make sure someone is there to cover for her when she leaves.

Melanie calls her husband and explains that she has chosen to stay an extra hour to help fix the system, and that she may be a few minutes late. Her husband says he will call the restaurant and let them know they may be a few minutes late for their reservation. Although Melanie missed her yoga class and was a few minutes late for her dinner date, she felt in control and at peace with herself because, when faced with a moment of choice, her decisions were based on her values.

It’s easy to pass the buck and live with the illusion that circumstances or other people are responsible for our decisions and the quality of our lives. That’s what happened in the first example with Melanie. A life filled with placing blame, finding fault, and making excuses is hardly a quality existence. It all boils down to one profound truth: You, and only you, are responsible for your choices. You, and only you, are responsible for what did or did not happen during the day. You, and only you, are responsible for stepping back from the moment of choice, evaluating the situation, making a decision based on your values, and choosing to act instead of react, as Melanie did in the second example. At the end of the day, if you have not accomplished all you set out to do, it is choosing to act deliberately based on your values and accepting responsibility for your choices that will smooth things over. You won’t feel frustrated or angry. You won’t blame circumstances or other people. Instead, you’ll feel empowered and in control of your life, ready to face the next day. This is truly part of the power of daily planning! Try it and find out for yourself.

Food for Thought

1. How might having a daily plan improve your relationships?
2. Do you find it difficult to stick to a plan during the day? Why or why not? What makes it difficult or easy?
3. What are some of the reasons you normally give for not accomplishing your daily tasks? What people, things, or circumstances do you normally blame for not getting things done?

JOURNAL WRITING ACTIVITY

CARRYING OUT YOUR DAILY PLAN

Get Real!

In this section, you learned that the first two steps to effective daily planning are to review appointments for the day and then make a realistic list of your tasks. In this activity, you'll schedule and review your appointments, and then compile a task list that can realistically be completed in the course of the day.

Materials

- Daily Planning Page tool
- Calculator

Time Estimate

15 minutes

Instructions

Step 1: Take a moment to think of all the things you need to accomplish today. Also, think of the fixed appointments you have scheduled for today.

Step 2: In the section of the Daily Planning Page marked "Appointment Schedule," mark any appointments, meetings, etc., you have planned for the day. In the section marked "Prioritized Daily Task List," make a list of all of the tasks you would like to accomplish today.

Step 3: Now take a few moments to review your appointments and add up the total number of hours you have committed to those appointments. (Remember to include prep time, driving time, etc.)

Step 4: Take the total number of appointment hours and subtract it from the total number of productive hours (such as 12) you feel you will have during the day.

Step 5: Multiply that number by 0.65. (Remember, the rule of thumb is not to schedule more than 65 percent of your available time.) The result will be the total number of hours you will realistically have to complete tasks.

Step 6: Finally, take another look at your task list. Depending on the number of available hours you have to work with, you may need to erase some items, move them to another day, or just forget about them. Remember, it's the truly important tasks that need your full attention.

Food for Thought

1. Were you surprised by the number of hours you had available compared to the number of tasks you had scheduled? Explain.
2. What did you learn about the different appointments you had scheduled? Was there anything you hadn't considered?
3. What types of tasks made the final cut on your list? Do they seem to reflect what is truly important?

SELF-ASSESSMENT ACTIVITY

CARRYING OUT YOUR DAILY PLAN

The ABCs and 123s of Prioritizing

Now that you have checked your appointments and made a realistic list of tasks, it's time for Step 3 of daily planning: prioritizing. In this activity, you'll quickly assign a value and an order to each of your tasks.

Materials

- Completed Daily Planning Page tool from the "Get Real!" activity.

Time Estimate

5 minutes

Instructions

Step 1: Take a look at the task list you whittled down in the previous activity. Trusting your gut feelings, assign an A to the tasks you feel deserve an A. Then move on to the Bs, and finally the Cs. Remember, the key to prioritizing is to do it quickly.

Step 2: Next, go back to your A tasks and order them numerically, according to priority. Do the same with the Bs and Cs. (Hint: If your A1 task is "Watch three hours of '70s game-show reruns," you might want to start over.)

Step 3: Take another look at your list and make sure everything looks and feels right. Remember, if everything is an A, nothing is an A.

Food for Thought

- How might prioritizing your tasks bring more balance to your life?
- Did you find yourself assigning an A to more than three or four tasks? If so, why do you think this is?
- How might you feel at the end of the day if you were to accomplish all of your A tasks versus all of your C tasks?
- Do you feel that your A tasks truly represent your highest priorities for the day? Are they tied to any of your goals? How do they align with your values?

SELF-ASSESSMENT ACTIVITY

CARRYING OUT YOUR DAILY PLAN

Act or React

In this section, we discussed how your daily plans will not always come off like clockwork, and that's okay. You'll be faced with other people's urgencies, unexpected interruptions, emergencies, and other things that will tug at you and derail you from your plans. Life happens. Yet, what will determine your success in the next moment, day, week, or even year is how you handle these interruptions. This activity will help you analyze whether, when faced with a moment of choice, you act deliberately and make choices based on your values, or react to circumstances and the influences of other people.

Time Estimate

15 minutes

Instructions

Complete the following assessment to gauge whether you are more prone to act or to react when making decisions. Your assessment can help you identify strengths and opportunities for further development.

Act or React Assessment

Respond to the following statements by placing a mark in the appropriate column. Answer honestly. That's the best way to identify areas of potential growth within yourself. After you have finished the assessment, you will calculate your score in order to find out if you usually act or react in a given moment of choice.

I work to solve problems rather than avoid them.

I take the initiative to get things done.

I focus on things I can do something about rather than on things beyond my control.

I maintain self-control, even in difficult or emotional circumstances.

I accept responsibility for my actions rather than make excuses.

I say things like "I chose to" instead of "I had to" or "She/he made me."

I try to do the right thing, even if it is unpopular.

I am decisive when a decision is needed.

SOMETIMES
USUALLY
ALWAYS
RARELY
NEVER

SOMETIMES
USUALLY
RARELY
NEVER
ALWAYS

(continued from previous page)

I receive negative feedback without becoming defensive.

At the end of the day, I feel in control, not frustrated and tired.

Total each column

x5 x4 x3 x2 x1

Multiplication Total

ACT OR REACT SCORE

(Add all five Multiplication Total boxes.)

Interpreting your score:

- 40–50 You act deliberately and take responsibility for your decisions. Good job!
- 30–40 You usually act deliberately, but sometimes you allow circumstances and others to control your decisions. You're on the right track.
- 20–30 You tend to react instead of act based on your values. You have a hard time taking responsibility for your actions. Look for opportunities to improve.
- >20 You allow circumstances and others to control you and your choices. You blame others and your surroundings for your circumstances and do not take responsibility for your actions. You can do better! We know it's in you!

Food for Thought

1. What did you learn about yourself? Are you more prone to act or react?
2. What are some areas in which you feel you can improve?
3. Do you think a close friend or relative would agree with your results? Why or why not?

SECTION 6

Using Your Planning System: Part 1

CHECK IT OUT!

USING YOUR PLANNING SYSTEM: PART 1

Overview

In the previous section, you learned that daily planning is a three-step process in which you “put the pedal to the metal” and make your weekly plans and goals happen. You also were reminded that your plans won’t always come off without a hitch; things come up during the day that deter you from your plans. When faced with a moment of choice, you learned that if you base your decisions on your values, and accept responsibility for your choices, you’ll feel accomplished and in control at the end of the day, even if all your plans didn’t work out.

In this section, you’ll see that it’s necessary to have a planning system that is able to track four key elements of your daily plans: tasks, appointments, notes, and contacts. You’ll also learn how you can use a planning system designed to keep a thumb on these “Core Four” elements and not let anything slip through the cracks.

Time Estimate

It should take approximately two hours to complete this section’s material.

Objectives

After successfully completing this section, you will be able to:

- Keep track of the Core Four, a vital part of achieving success in your daily plans.
- Apply tracking techniques using a planning system so vital information is never misplaced and is always easily accessible.

Activities

During this section, you will complete the following activities:

- **Plan On It.** In this activity, you will apply the knowledge you’ve gained about the Core Four and use planning tools to organize and plan your life for the next week.
- **“Too Busy” Interview.** In this activity, you’ll interview two individuals and solicit their insights and responses on what being busy means and how a planning system might be of use to them.

LISTEN UP!

USING YOUR PLANNING SYSTEM: PART 1

Listening

FOCUS: Achieving Your Highest Priorities CD

Disc Three: Tracks 1–2

Time Estimate

30 minutes

Food for Thought

Many of us lead very busy lives. It's okay to be busy, but you need to make sure you are busying yourself with the right things. There are many things you have to keep track of during the day. These items usually fall into four different categories: tasks, appointments, notes, and contacts. It is essential to have a planning system that can manage and track these Core Four items. Armed with the right planning tool each day, you'll lead a more productive, organized, and fulfilling life. Please write your response to the following questions:

1. Do you ever feel you are too busy to do what you'd really like to do? What does this feeling indicate?
2. Have you ever used or are you currently using a planning system? What features do you like about it? What features do you dislike?
3. Do you find it difficult to keep track of all the things you have to do during the day? Do you find yourself missing appointments, running late, or forgetting important things?
4. Would you like to end the day knowing precisely what you have and have not accomplished? How might this reduce your stress and bring more balance to your life?

GETTING DOWN TO IT—PART 1

USING YOUR PLANNING SYSTEM: PART 1

Running Around in Circles: What Would You Do?

*It's not so much how busy you are, but why you are busy.
The bee is praised. The mosquito is swatted.*

MARIE O'CONNOR—author

How much of your time is spent searching for misplaced items, struggling to comply with numerous urgent requests, and juggling demands on your time from family and friends?

We have all felt overwhelmed like this at one time or another! Let's take a look at a hypothetical situation in which one person is *really* feeling this kind of pressure.

Mark is a young business manager on the rise in his company. He has many responsibilities at home and at work. On this particular morning, he hit the snooze button one too many times and is late for work yet again. As he races through the door of his office, he thinks, "Man, I'm worn out already! How am I ever going to get through the rest of the day? Well, I just have to, that's all."

Within the first five minutes of work, Mark has three team members show up at his door with problems that require his immediate attention. His voice mailbox is full, and he has 50 e-mails to respond to. His wife calls to tell him he forgot to leave some important paperwork she was supposed to take care of that day, so now he has to take care of it himself.

By 10 o'clock, Mark learns that there are several late shipments that will affect their customers that day. The company can't afford that, or the potential loss of business. To make matters worse, the company is already over budget for the month, and it's only the 20th.

Eleven o'clock brings news that six people have called in sick, and most of them from the same department. Mark's wife calls again and tells him the water heater has broken down. She wants to know if she should buy a new one or not. He needs to decide immediately. His 11 o'clock appointment shows up 30 minutes late, but he can't afford to not see this client.

There will be no lunch again today; a granola bar on the run doesn't count. By 3 o'clock, Mark is overwhelmed with computer problems, late sales reports, more product orders than he can manage, more voice mails than he can possibly get to, and turbulence on the home front.

He's exhausted. Everything is urgent.

As he lays his head on his desk, he thinks, "Will this day ever end?"

It's easy to get caught up in the "busyness" of life and lose your focus, as illustrated by Mark's story.



A good planning system helps you keep track of important meetings, personal appointments, and people you truly care about.

GETTING DOWN TO IT—PART 2

USING YOUR PLANNING SYSTEM: PART 1

The “Core Four”: Tasks, Appointments, Notes, and Contacts

Life offers two great gifts—time, and the ability to choose how we spend it. Planning is a process of choosing among those many options. If we do not choose to plan, then we choose to have others plan for us.

RICHARD I. WINWORD—author

All your “places to go, things to do, people to see” (and notes to take!) are what we like to call the “Core Four.” As the name implies, there are four things that are essential for you to manage, and manage well, on a daily basis. These four things are tasks, appointments, notes, and contacts.

An effective planning system needs to be able to manage, keep track of, and help you stay on top of the Core Four. If you look at any top-notch planning system—be it a paper planner, a PDA, or an e-mail calendar—the four main components the system revolves around are tasks, appointments, notes, and contacts—the Core Four!

Before we delve into each of the Core Four components, it is important to note that there are three key properties essential to an effective planning system. Not everyone uses a paper-based planner; many of you are techno-savvy and prefer the latest and greatest gadgets. Whatever type of planning system you use, it needs to be integrated, mobile, and personalized.

Integrated simply means that the components of your planning system are working together. Today we juggle more calendars, activities, and devices than ever before. You may have a cell phone, a PDA, and a computer system to help keep you organized, but if they are not working together, if you have to make double entries and update each one separately, then you open yourself to the possibility of things slipping through the cracks.

Your system must also be *mobile*. Your planning system should have a mobile component—something you carry with you so you always have access to the Core Four. Let’s say you do most of your planning on your desktop computer at work. When you go to a meeting, you can’t bring your computer with you. Perhaps you choose to sync your information to a PDA. This is your mobile component. Or maybe you prefer to carry a notebook or some other type of planner with you to take notes, jot down appointments, and so on. This is where a paper-based component is most reliable. You can take paper with you anywhere you go.

Finally, your system should be *personalized*. It should be easy for you to use and should fit your personal lifestyle. If you have a job that requires you to spend a good

Poor guy! He seemed pretty busy, right? But was he busy with the right things—the most important things? Many people, perhaps you included, think that being busy, running ragged, and jumping from one urgency to the next leads to success. But does it? Working from an urgency mind-set will only lead to one thing: burnout! The key is to be busy accomplishing the important things—not what someone else tells you is important, but what you have decided is important. Your success in any part of your professional or personal life depends on how well you manage and keep track of all that stuff. Don’t forget that this “stuff” just happens to be tied to your values and goals. It’s important because you decided it was important.

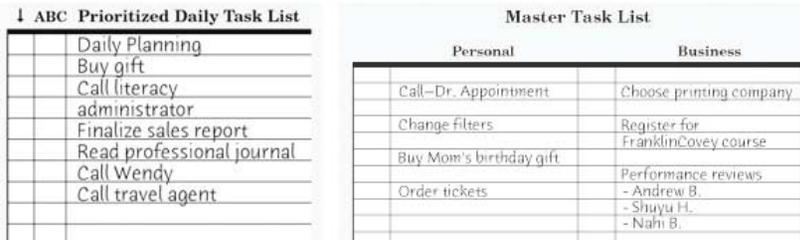
Although this scenario probably sounds all too familiar, your life doesn’t have to be like Mark’s. You don’t have to live your life in fast-forward mode, rushing from one thing to another and not doing what you feel is important. You’ve come too far now to let that happen. You are building on a strong foundation of values: you envisioned the life you want, and you have some goals in mind; you learned how weekly planning can bring balance; and you know that having a daily plan helps you focus on those important things that tie back to your values and goals. And remember, you can choose to react and have a hectic life, or you can choose to act, live in harmony with your values, and lead a fulfilling life.

You deal with a lot of information each day, and if you don’t manage it well, it will get the best of you. Where do you list your appointments for the day? How do you keep track of phone numbers? How do you store important information from conversations and meetings? Where do you keep your “to do” list? If you’re depending on your brain to keep everything straight, you’re “heading” (pun intended) for trouble! Although your brain is pretty amazing, there is a limit to the amount of information it can process and track. It’s vital that you give your brain a break and utilize some type of planning system that will help you stay on top of things. This could be a wall calendar, a PDA, or your desktop computer. Perhaps you have a notebook or some other type of paper planner. Whatever the case, you need some type of planning system.

As you work through this section, we’ll discuss some planning techniques and tools that have proven to be effective in managing the day-to-day information you encounter. Most of the examples you will see come from a paper-based planner called the Franklin Planner®. This isn’t the only type of planning system that works, but it is a good idea for your planning system to have some type of paper-based component. As you progress through the section and learn about these planning techniques, ask yourself: “How can I adapt this planning tool and make it work for me? How can I best incorporate this into my planning system?”

deal of time on the road, a handheld device might be the answer for you. Perhaps you are one of those people who has always used paper. Paper has worked for many, many years for a lot of people, and there is nothing wrong with sticking with it. Perhaps you like the convenience and features of a handheld, but just can't get the hang of using those Graffiti® symbols for taking notes. In this case, you might try combining the handheld with a small notebook or planner. Everyone has different needs and likes. In the last section, we'll discuss these three key priorities in greater detail, and provide you with some resources to help you build a planning system to meet your specific needs.

Tasks



The Prioritized Daily Task List and the monthly Master Task List track all the important activities that you want to accomplish. (Image © 2003 FranklinCovey.)

Your planning system should enable you to keep track of daily tasks as well as tasks you'd like to accomplish at a later date. You've already had some experience with tasks, and learned how the Franklin Planner is designed to handle them. To refresh your memory, take a look at the daily page. You'll see that it has two main columns. The column on the left, entitled "Prioritized Daily Task List," is where you list your tasks for the day.

The Franklin Planner is also equipped with a tool called the "Master Task List," which is found on the back of the Monthly Calendar for each month. The Master Task List is kind of a holding place for all the tasks you want to get done that month, but you are unsure as to when you will do them. For example, say you realize your car is getting close to needing another oil change. You don't know what day during the month you'll have time to take your car to the service station, and it isn't urgent. You still have a few hundred miles to go before you need to change the oil, so you add "Get oil change" to your Master Task List for the current month. Now the task is off your mind and recorded so you won't forget about it. As was stated in the listening assignment, the Master Task List is a stress-reliever page, a "dumping ground" for tasks that need to be accomplished but which have no

specific deadline. Make certain that during your weekly planning session you review your Master Task List. If you do this, you'll always be on top of things.

Appointments

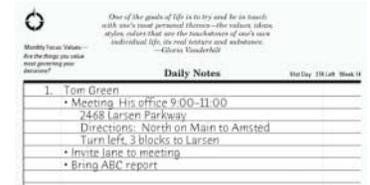


The daily Appointment Schedule and the Monthly Calendar list all of the appointments and meetings you have to keep. (Image © 2003 FranklinCovey.)

You're already a little familiar with how the Franklin Planner handles appointments. If you look at the daily page again, you'll see that the right-hand column is entitled "Appointment Schedule." This is where you would usually list your appointments for the day. Another option is to use the Monthly Calendar. It is found on the opposite side of the Master Task List. The Franklin Planner includes 12 Monthly Calendars, and all 12 can be placed in the planner so you can record appointments for future months. Just as with the Master Task List, it is always a good idea to check your Monthly Calendar during weekly planning to make sure you have everything in order. It's vital that your planning system includes a tool that helps you stay on top of your appointments.

Notes

It's important to have a place to take notes. In a meeting, you can use this space to record sales goals, doodle, or write down the perfect ending for the screenplay you've been working on for the past five years. You can capture all of your notes, doodles, and strokes of genius on what is called the "Daily Notes" page, found opposite the daily



The mobile Daily Notes page is a perfect place to jot down notes, thoughts, or even doodles. (Image © 2003 FranklinCovey.)

page. Think of this page as you would a yellow pad or notebook. The Daily Notes page is accessible, reliable, and mobile.

Contacts

Name and Address	Phone
Calvin Dorbert 1443 North Beachwood Dresden, NY 14529	Work (315) 555-2168 Fax Mobile (315) 555-6225 Home
E-mail cdorbert@dorbertinc.com	
Joanna Dunkle 118 Smiths Grove Road Haddonfield, IL 60503	Work (608) 555-9148 Fax (608) 555-9149 Mobile Home
E-mail joanna_dunkle@loomis.org	
	Work Fax Mobile Home

INFORMATION RECORD			
Name	Gurjain Doshi	Organization	Bio-Sci
Address	2468 Concord Pike San Jose, CA		
Phone	Home 221-4601	Mobile	247-2839
E-mail	Wkore		
Date	Conversation Notes	Follow-up	
8/5	Class enrollment increased for 9.25 program. New training location will be arranged.		
8/12	Definitely want to do the profiles (assessments). Mission and values statements are being faxed today.		

You can keep track of contact information by utilizing either the Name and Address index, or the Information Record. (Image © 2003 FranklinCovey.)

Make sure you include a tool in your planning system to keep tabs on the important people in your life. The Franklin Planner comes equipped with an alphabetized “Name and Address” index to do just that. It includes space to record mailing addresses, phone numbers, and e-mail addresses as well.

Another option is to use what is called the “Information Record.” This tool can be used for people or organizations with whom you are in contact on a regular basis. The Information Record offers you a place to write down contact information as well as record notes from interactions and conversations. You can then place the Information Record behind the appropriate tab in the Name and Address index.

Practice Makes Perfect

You’ve probably had a lot of experience dealing with and documenting the Core Four (even if you’ve never referred to it as such). Let’s run through a few hypothetical scenarios to test your knowledge of ways to handle them with a planning system.

Scenario 1

Ramon gets a call from his brother Carlos in New York. Ramon’s family and his brother’s family have been planning to take a trip to an amusement park in the summer. Ramon’s brother is in charge of booking a hotel, and is calling to give Ramon the address and phone number of the resort. During their conversation, they decide that Ramon will take responsibility for securing rental cars for the trip. Since the trip is a little more than two months away, Ramon feels he can call a rental-car agency next month.

Where do you think Ramon could record the address and phone number of the hotel?

With any planning system, the best place to record this information would be someplace where it can be accessed quickly and easily. If Ramon were using a paper-

based system like the Franklin Planner, the best place to jot it down would be the Daily Notes page. What’s great about the Daily Notes page is that you don’t need to copy the information for future use. (In the last section, we’ll show you a technique that will help you retrieve information from the Daily Notes page at the precise time you need it.) This is key for any planning system. Copying not only wastes time, it also opens the door for losing or misplacing information.

Is Ramon’s agreement to take care of the rental cars a task or an appointment?

Taking care of the rental cars is essentially a task for Ramon to complete in the future. If you were using a wall calendar, you could write a note at the top of the calendar for next month as a reminder. If you were using a PDA, you could input a note on the first day of the following month. Your planning system should have a way of reminding you of tasks that don’t yet have a specific date, but need to be completed sometime in the future. With the Franklin Planner, Ramon can go to the Master Task List two months from now and make a note to “Book rental cars.” The task is now off his mind and he can forget about it. When he does his weekly planning for the first week of that month, he’ll reference the Master Task List and be reminded to book the rental cars.

Scenario 2

When Ramon gets home from work on Thursday, his wife informs him that some old friends are in town and she has invited them over for dinner on Friday at around 6:30 p.m. She asks Ramon to pick up some ice cream on the way home from work before dinner Friday.

Where does Ramon go from here? Is this dinner a task or an appointment?

Since the dinner with some old friends is committed time, Ramon needs to treat this information as an appointment. Whatever planning system you use, be sure to block out that time so you don’t overbook yourself. If Ramon were using the Franklin Planner, he’d turn to the daily page for Friday and record it on the Appointment Schedule. He may also wish to record it on his Monthly Calendar as well.

How will Ramon remember to pick up the ice cream?

Whatever planning system you use, you’d probably want to treat this as a task. Make a note on the day you need to remember the ice cream or add it to your “to do” list. With the Franklin Planner, Ramon turns to the Prioritized Daily Task List for Friday and writes, “Get ice cream.” When he does his daily planning on Friday morning, he’ll be reminded of the appointment and also the task to get some ice cream. Utilizing a planner allows you to record the right information on the right day, and reminds you of tasks you need to complete in the future.

GETTING DOWN TO IT—PART 3

USING YOUR PLANNING SYSTEM—PART 1

Tracking Commitments

Your planning system should help you track your tasks and commitments so you are constantly aware of what you have and have not done. We've all had those sudden panic attacks when, at the end of the day, we realize we've forgotten something very important. Many planning systems have a set of symbols in place to help you keep track of things. On the daily page of the Franklin Planner, you'll notice a group of symbols in the upper left-hand corner above the Prioritized Daily Task List. Let's take a closer look at each one.

Task Completed

When you complete a task, give it a checkmark. Checking off your achievements throughout the day gives you a feeling of accomplishment and control. Put as big a checkmark as you want in that box. You've earned it!

Planned Forward

When you have to reschedule a task for one reason or another, use the Planned Forward symbol (a forward-pointing arrow). Let's say you call your doctor to schedule a routine physical, and you get a recorded message. When you fail to reach a live person after several attempts, you finally decide to leave a message. Since you weren't able to schedule an appointment, you put a forward-pointing arrow by that task. You'd then turn to the daily page for the next day and record that same task.

Task Deleted

Giving a task an "X" means you have deleted it from your list and erased it from your mind. Let's say that your friend calls and cancels a skiing trip you had planned for the next day. On your task list for today, you wrote "Wax skis." You can now put an "X" by that task and forget about it.

Delegated Task

Because of interruptions, meetings, and other unforeseen events, sometimes you'll have to let go of things during the day and trust someone else to do them. This is called delegation. The symbol that is used for a delegated task is a combination of a letter, a circle, and a check. Let's say you have a design meeting with a client next Monday and want to make sure you have a room ready. You have a task on your list that says "Reserve room for meeting." It's Friday, and you just got out of a last-minute meeting with your supervisor, during which you were introduced to a new



The daily Appointment Schedule and the Monthly Calendar list all of the appointments and meetings you have to keep.
(Image © 2003 FranklinCovey.)

client. You are now running a bit behind schedule, and you have to leave immediately to make it to your son's soccer game. Since you don't have time to schedule the room for next Monday, you ask your co-worker Stan if he wouldn't mind scheduling the room. Stan agrees to help. On your way out to the car, in the box next to the "Reserve room for meeting" task, you put a circle and then an "S" next to the circle. The circle means that you have delegated the task, and the "S" reminds you that you delegated it to Stan. Later that evening, you check your e-mail and find that you have a message from Stan stating he was able to reserve a room. You then put a check in the circle, indicating that the task you delegated to Stan has been completed.

Task in Process

This symbol will help you resume a task after you have set it aside for one reason or another. The symbol used for a task in process is a dot. Let's say that before you were called into your last-minute meeting in the example above, you were reading an article in your favorite trade magazine. You try to keep up to date in your field by reading for at least 20 minutes a day. When your supervisor called you (and interrupted you!), you put a dot next to the task that said "Read for 20 minutes." Before you went to bed that night, you took out your trade magazine, read for another 10 minutes, and finished the article. You later put a checkmark over the dot to indicate that you had completed the task.

Again, this is the set of tracking symbols used in the Franklin Planner. If your current system doesn't use these same symbols, go with the ones designed for that system. If you aren't currently using tracking symbols, it's a good idea to develop a customized set that works for you.

If you use a planning system that has tools to handle tasks, notes, appointments, and contacts, and if you incorporate a set of customized tracking symbols into that system, you'll always know at any given moment what you have and have not accomplished. You'll be organized, in control, and have peace of mind.

DISCOVERY ACTIVITY

Food for Thought

1. Can you relate to the story of Mark, the busy business manager? Have you ever been so “busy” during the day that, when it ends, you find that you really haven’t accomplished much? How did this make you feel?
2. What has been your biggest challenge in keeping track of tasks, appointments, notes, or contacts?
3. What do you think the benefit would be of using a planning system that had a mobile component?
4. How have you normally tracked your tasks or commitments? After reading this section, what was your biggest discovery in relation to tracking commitments?

USING YOUR PLANNING SYSTEM: PART 1

Plan On It

Are you ready to have some fun for the next week and feel like a lean, mean planning machine? It’s time to apply the knowledge you gained about the Core Four and keep track of your tasks and commitments during the day.

Materials

- Daily page
- Daily Notes page
- Monthly Calendar
- Name and Address index

Time Estimate

One week

Instructions

For the next week, apply the knowledge you’ve gained in this section and use the planning tools above to help you live a more organized and productive life. At the end of the week, you will have filled in planning pages that have helped you track your tasks, appointments, notes, and contacts. Remember to start the week with a weekly planning session, and have a daily planning session each day.

Food for Thought

1. What was the biggest challenge you encountered as you tried to plan the week? Was it hard or easy for you to get started? Explain.
2. What insights did you gain about yourself and your priorities during the week? Were there any tasks you kept forwarding? What kind of tasks did you delete? Did you delegate anything?
3. How did you feel at the end of each day? Did you have a clear picture of what you did and did not accomplish? How did you feel about the things you didn’t get done?
4. How did you feel at the end of the week? More organized? More peaceful?

INTERVIEW ACTIVITY

USING YOUR PLANNING SYSTEM: PART 1

“Too Busy” Interview

In this activity, you will interview two people whom you associate with on a regular basis. You may wish to choose someone from your professional life and someone from your personal life. You will ask them to share their feelings about being “busy,” and what activities they normally engage in during the day. You will introduce the concept of the Core Four and ask for feedback on how a planning system might help keep them focused on their daily affairs.

Time Estimate
30 minutes

Instructions

Step 1: Schedule an interview with two people you have a strong relationship with and in whom you have a high level of confidence. If possible, select one person from your personal life and one person from your professional life.

Step 2: Use the questions provided below to gather information. Feel free to add your own questions as well.

Interview Questions

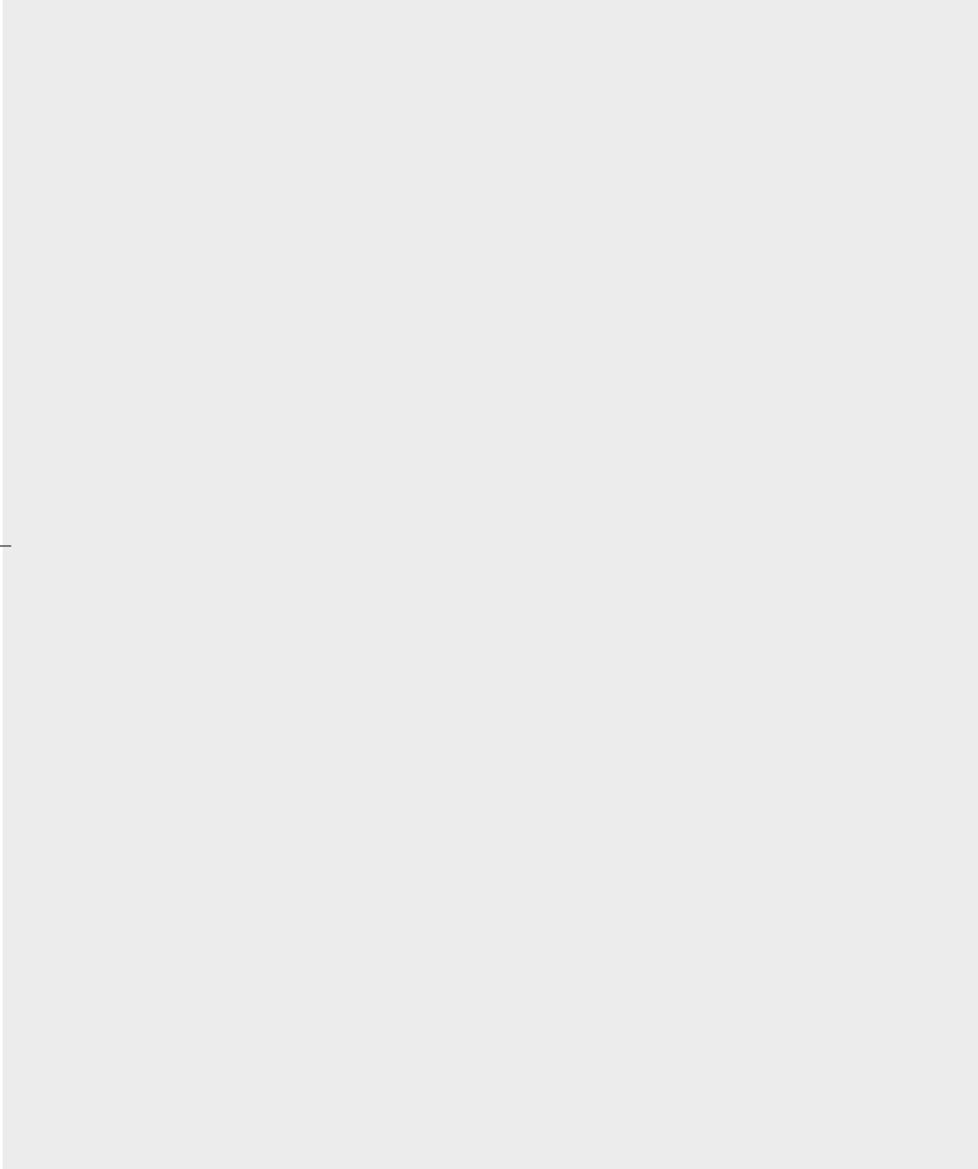
1. What does being “busy” mean to you?
2. Do you admire people who always seem busy? Why or why not?
3. Is being busy something you want your family or friends to remember you for?
4. Do you think it is possible to busy yourself with the wrong things?
Why or why not?
5. Do you ever feel like you’ve done a lot of “stuff” during the day, but when the day ends, you really don’t feel that you’ve accomplished much? Why do you think this might be?

Explain the Core Four, then ask:

6. Have you ever had trouble managing your tasks, appointments, notes, and contacts on a daily basis?
7. How might your average day be different if you had a planning system that helped manage and keep track of the Core Four?

Food for Thought

1. Were you surprised by any of the answers you received? Please explain.
2. Were there any similarities between your interviewees regarding their feelings and definitions of being “busy”?
3. Did either of your interviewees agree that he or she is sometimes busy with the wrong type of things? Was any reason given for why this happens?
4. Were there any common strengths you noticed with how your interviewees handle the Core Four? Were there any common weaknesses?



SECTION 7
Using Your
Planning System:
Part 2



CHECK IT OUT!

USING YOUR PLANNING SYSTEM: PART 2

Overview

In the previous section, you considered the concept of “being busy,” and found that if you busy yourself with the unimportant, you’ll end up running in circles. You then saw how an effective planning system, regardless of whether it is paper-based, electronic, or a combination of both, helps you focus on the important things by addressing and managing the Core Four: tasks, appointments, notes, and contacts. You also learned that a customized set of tracking symbols helps you stay on top of your plans and tasks throughout the day so that nothing is left undone.

An important part of any planning system is the ability to take notes and capture important information. But what if, after all is said and done, you can’t find information when you need it? In this section, you’ll learn techniques for retrieving information at the precise time you need it. You’ll also be introduced to some additional personal-management tools that can enhance your planning system.

Time Estimate

It should take approximately 2 hours to complete this section’s material.

Objectives

After successfully completing this section, you will be able to:

- Apply a technique that will allow you to retrieve or locate information at the precise moment you need it.
- Further customize your planning system by incorporating additional personal-management tools.

Activities

During this section, you will complete the following activities:

- **Waste Not, Want Not.** This activity will help you discover how much time you waste looking for lost or misplaced information.
- **The Missing Link.** This activity will help you apply a technique that will link your past information to future commitments and activities.
- **Mission Possible (optional).** Using the Resource CD-ROM, you will complete a Mission wizard that will help you create, edit, and print a Personal Mission Statement®.

LISTEN UP!

YOUR PLANNING SYSTEM: PART 2

Listening

FOCUS: Achieving Your Highest Priorities CD

Disc Three: Track 3

Time Estimate

15 minutes

Food for Thought

Having a planning system that allows you to capture important information in a consistent place and then retrieve it at the precise moment you need it is invaluable for fighting off information overload.

1. Do you ever find yourself saying, “Now where did I put that?” or “I know it was right here!” How do you normally keep track of important information?
2. How long does it take you to find information or notes you captured in the past? Have you ever wondered if there were an easier method for capturing and retrieving information than the method you currently use?

GETTING DOWN TO IT—PART 1

USING YOUR PLANNING SYSTEM: PART 2

Now What Did I Do With That?

Knowledge is of two kinds. We know a subject ourselves, or we know where we can find information upon it.

SAMUEL JOHNSON—British author and lexicographer

A January 1999 survey in *Inc.* magazine found that the average worker spends 150 hours each year looking for lost information. It also pointed out that 71 percent of workers say their main job is tracking down information. Your audio CD mentions another recent survey that suggests people might be spending as much as 45 minutes a day searching for information or other things they can't find. Imagine what else you could be doing each day if you were able to gain back 45 minutes!

In his book *Information Anxiety*, author Richard Saul Wurman says, “Information overload is the inability to extract needed knowledge from an immense quantity of information for one of many reasons.” He explains that information overload can occur when a person:

- Does not understand the available information.
- Feels overwhelmed by the amount of information to be understood.
- Does not know if certain information exists.
- Does not know where to find information.
- Knows where to find information, but does not have the key to access it.

For many of us, this is the reality we live in today. Let's face it—we are overwhelmed with information each day, and most of us struggle to keep track of it and find it when we need it. Looking for lost or misplaced information is a huge waste of time. You already know that a customized planning system can help you keep track of it all. Now it's time to find out how it can also help you find or retrieve information when you need it.

Keeping Key Information in One Place

You've probably been on a phone call, in a meeting, or having a conversation when some



The ability to record or retrieve information whenever and wherever you need it is one reason to use a personalized planning system.

important information comes up that you want to remember. Maybe it's driving directions or some important strategies to meet your work goals. Whatever it may be, it's important and you need to capture it. As stated in the previous section, many people choose to manage the Core Four with other tools such as a PDA or a desktop computer. However, there are most likely going to be times when you record important notes on paper, whether it be a multicolored "sticky" note, a scrap of paper, or even a napkin. What usually happens to those scraps of paper? They get lost or misplaced. This is why, regardless of what type of planning system you have, it's important to have a mobile component that goes with you everywhere, allowing you to capture and store important information in one place. In this section, you'll observe one method of capturing information that works well with paper. After seeing it in action, you can use it or adapt it to fit your own personalized planning system.

Linking Past and Future

In the previous section, we briefly discussed the Daily Notes page. This page allows you to capture notes, conversations, and any other key pieces of information you'll need to reference later. It also eliminates those floating pieces of paper you may have stuck in your pockets or on your computer monitor.

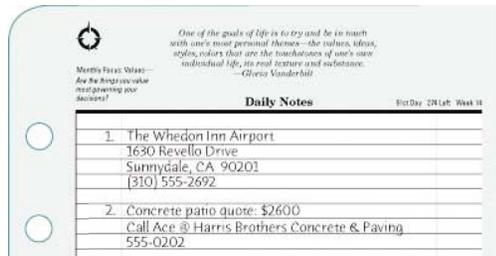
Recording key information on the Daily Notes page ensures that nothing will "fall through the cracks."

Remember Ramon? He and his brother are planning a joint family vacation.

Ramon's brother called to give him the phone number, address, and driving

directions to the hotel in which they will be staying. Ramon captured that information on the Daily Notes page the day his brother called. How will Ramon find that information when he needs it next month?

If he wanted to, Ramon could copy the information from the Daily Notes page, or he could grab a sticky note, copy the information, and then stick the note on his wall calendar. However, there is actually a more effective technique that will allow Ramon to link important information to the time he'll need it without copying it and without running the risk of misplacing it. All Ramon needs to do is link the notes he captured when his brother called to the future time he'll need them with a simple "go to" command.



You can quickly refer back to notes you've taken in the past when you use some type of labeling system.
(Image © 2003 FranklinCovey.)

When you make a note on the Daily Notes page, it's best if you number it or use some other system to order the information. We also recommended that if you use a paper-based planning system, you always carry the previous, current, and next month's planning pages. If you look at Ramon's Daily Notes page, you'll notice there is a "1" by the notes he took regarding the hotel. You'll also notice that he took other notes during the day, and numbered them as well. Let's say it's June 7, and Ramon and his brother plan on arriving at the hotel on July 24 at around 5 p.m.

Ramon turns to his daily page for July 24 and, in the 5 o'clock slot under the Appointment Schedule, writes "Hotel check-in (6/7/1)." These numbers represent where in his planner Ramon initially captured the hotel information. The first number, 6, represents the month, June. The second number, 7, is the day. The last number, 1, is a reference to the note number recorded on the Daily Notes page for June 7. It's as easy as that! Ramon didn't have to rewrite anything, and he can pretty much forget about the information until July 24.

This process allows you to easily link information that will soon be in the past to the time you'll need it in the future. This same technique can work for technology users as well. It may be as simple as using the "Find" function if you are using a PDA or desktop computer.

Now, let's fast-forward to July 24, when Ramon, his brother, and their families step off the plane. They are a bit weary from their flight, and want to get to the hotel as soon as possible. Both families get in their rental cars and start off. About halfway there, Ramon's brother searches in his wallet for the hotel address he wrote on the back of a receipt. He begins to feel a little uneasy when he doesn't find it, so he asks his wife if she remembers the address. After searching her make-up bag (where she is sure she put that sticky note with the address), she also comes up empty-handed.

A minute later, Ramon's cell phone rings. It's his brother, wondering if he happens to have the address and driving directions to the hotel. Ramon has already opened his planner to July 24, and has seen the "Hotel check-in (6/7/1)" note written in the 5 p.m. appointment slot. He turns back to June 7, where he captured the information he needed to find their way to the hotel. Using this same technique (or a personalized variation of it), you'll be able to quickly find information you've recorded for the exact time you'll need it.



In this example, the (6/7/1) shorthand refers to the month, date, and label of a note taken in the past.
(Image © 2003 FranklinCovey.)

GETTING DOWN TO IT—PART 2

USING YOUR PLANNING SYSTEM: PART 2

Personal Management Beyond the Day-to-Day

The planning tools we have discussed up to this point comprise the basics of what is needed to effectively manage your life on a daily basis. What follows are some supplemental tools that can further enhance your planning system. Again, these are paper-based tools used in the Franklin Planner, but the ideas and concepts can be customized and adapted to fit the planning system of your choice.

Monthly Index Page

The Monthly Index page can also be an important retrieval document. Information on the Daily Notes page doesn't always need to be converted into future tasks or appointments. For example, you might need things like phone numbers, quotes, or ideas again, but you might not know when you'll need them. Completing the index each month is easy. Write the date of the Daily Notes page where the information is located, followed by a short summary of the note. It's a good idea to update the index page as you go through the month.

Index	
Date	Index important information and events recorded on the month's daily notes.
1	Nancy—car information
3	Charles Bennett; speaker at ASTD
4	Information on fitness center
6	Denver trip: new contacts
6	Kim Li—quotes for brochure
12	Board meeting highlights
15	Book list: "4 Roles of Leadership"
23	Chris Wall, EBITDA information for budget

You can record any notes that don't yet pertain to a given activity on the Monthly Index page.
(Image © 2003 FranklinCovey.)

Storage Binder

If you use a paper-based planner, you probably don't have room to carry around 12 months of daily pages. We think it's a good idea to keep three months of daily pages in your planner: the previous month, the current month, and the next month. But what if you had to retrieve some notes from today five months from now? Where will you find them? We suggest that you store them in some type of binder or folder where you can have easy access to them. It's a good idea to keep that binder or folder in the same place you do your weekly and daily planning. As also mentioned earlier, PDA or desktop users can use the "find" function to locate and retrieve needed information.

Information Record Page

Many of you probably have key clients or contacts with whom you communicate frequently—people like your boss, good friends, committee members, etc. If you put notes from every conversation you have with these people on the Daily Notes page, you could end up with a real retrieval problem. The Information Record is a handy tool because it helps you keep these notes in one place and it's pretty simple to use. You can monitor and follow up on conversations, voice mail messages, e-mail messages, or whatever other information you need to keep track of in regard to a particular contact.

Values, Roles, and Mission Pages

As you've already learned, your values form the base of the Productivity Pyramid and guide your daily decisions. The Values page has space to write your values and a clarifying statement for each one. You discussed your roles and how they relate to your goals. The Roles page allows you space to record your roles, key people associated with each role, and a clarifying statement for each role as well. We haven't had much discussion about a mission statement in this workbook, but if you are interested, an optional activity for this section involves accessing the Mission wizard located on your Bonus Resource CD-ROM. (Please see the optional "Mission Possible" activity.) Having access to your values, roles, and mission statement is a great support during weekly and daily planning.

Key Information Tools

There is probably some key information about you and others that you would like to have handy at any given moment. The Personal Information, Medical Record, and Special Days pages allow you to keep track of personal and medical records, and even birthdays and anniversaries without having to transfer them to a new planner each year. Again, one of the keys to an effective planning system is that it needs to be personalized. It's important that you evaluate your current system and determine whether or not it is meeting your needs. Take the knowledge you have gained from this and previous sections and improve your system. Perhaps you have discovered that your planning system doesn't have a technique to help you find information quickly, or that a Monthly Index or Information Record would really come in handy. Whatever your situation, it's now time to apply these new insights and knowledge and create the best planning system to meet your needs.

DISCOVERY ACTIVITY

Food for Thought

1. Do you feel overwhelmed by the amount of information you face each day? Why or why not?
2. What is your biggest challenge in dealing with information?
3. How much time do you spend looking for information? How do you feel when you can't locate important information?
4. How have you normally kept track of important information in the past? What type of system have you used?
5. How might using a "linking" or "go to" technique improve your current system?
6. How might additional planning tools that keep track of personal information improve your planning system?

USING YOUR PLANNING SYSTEM: PART 2

Waste Not, Want Not

Do you waste a lot of time looking for information? If you aren't sure, this activity will help you discover just how much time you spend searching for information each week.

Time Estimate

One week

Instructions

For the next week, use a notebook to keep track of how much time you waste looking for information. You may want to use a separate sheet of paper for each day of the week. When you realize you are looking for something, note the start time. Once you find it, note the end time. Add up your time each day, then add up the daily totals to see how much time you waste each week looking for information. You may also want to note what you were looking for and how you felt before and after you found it.

Food for Thought

1. Were you surprised by the amount of time you wasted looking for information in a given week? Why or why not?
2. What type of information did you find yourself looking for? Feel free to share specific examples.
3. What types of feelings did you have as you were searching for this information? Did these feelings have a negative impact on your day? Why or why not?

SELF-ASSESSMENT ACTIVITY

USING YOUR PLANNING SYSTEM: PART 2

The Missing Link

It's time to put into practice the "linking" or "go to" command you learned about in this section. The linking technique allows you to link information you captured in the past to the specific time and day that it will be needed in the future.

Materials

- Daily page
- Daily Notes page

Time Estimate

10 minutes

Instructions

Step 1: Identify and locate some specific information you have captured that you will need in the future, such as an address, a story, or notes from a meeting.

Step 2: On the Daily Notes page, write the number 1, and then record the specifics of the information you have captured. Make sure that the date on the Daily Notes page reflects the current date.

Step 3: Next, on the daily page for a date in the future, write the task or appointment to which this information applies. Next to that task or appointment, record the current month and day, followed by the number 1, in parentheses.

Example: Swimming section (6/15/1). This now links the future event to information that was recorded in the past.

Food for Thought

1. How might incorporating a linking technique into your current planning system improve your productivity?
2. How much time do you think implementing a linking technique might save you each day? each week?

SELF-ASSESSMENT ACTIVITY (OPTIONAL)

USING YOUR PLANNING SYSTEM: PART 2

Mission Possible

In your audio set, you'll find a Bonus Resource CD-ROM. In this activity, you'll use that CD-ROM to work through the Mission wizard. This wizard will help you get started on creating a Personal Mission Statement, as well as give you food for thought.

Materials

- Bonus Resource CD-ROM
- Printer (optional)

Time Estimate

30 minutes

Instructions

Step 1: Insert the Bonus Resource CD-ROM into your computer.

Step 2: After the introduction has finished and you have accepted the licensing agreement, hover your mouse pointer over "Life-Leadership Wizards" in the toolbar at the top of the page. Click "Mission/Values."

Step 3: Proceed through the wizard as directed. This wizard will help you generate ideas for your mission statement.

Step 4: If you wish, edit and print your mission statement.

Food for Thought

1. Have you ever written a mission statement? Was it difficult for you? Why or why not?
2. Did you find that your mission statement was tied to your values, roles, and goals?
3. How will you implement and use your mission statement in your daily life?

SECTION 8

Integrating Your Systems and Keeping Your Focus

CHECK IT OUT!

INTEGRATING SYSTEMS AND KEEPING YOUR FOCUS

Overview

You've learned that an effective planning system is three things: integrated, mobile, and personalized. In this section, you'll learn about various configurations of different planning systems and make some decisions about what might work best for you. You'll also discover ways to personalize your planning system so you are comfortable with it.

You've been given a lot of information—concepts, ideas, and skills. You might be feeling a bit overwhelmed by it all. You will finish the workbook learning ways to keep your focus by putting all these concepts, ideas, and skills to work for you.

Time Estimate

It should take approximately 2 hours to complete this section's material.

Objectives

After successfully completing this section, you will be able to:

- Identify the three keys to an effective planning system.
- Describe the benefits of having a complete mobile component in your planning system.
- Design a plan to integrate multiple tools—electronic and paper—into an effective planning system.
- Handle the distractions of e-mail, voice mail, procrastination, and interruptions.
- Use a filtering system to effectively handle all incoming information.

Activities

During this section, you will complete the following activities:

- **“So, Tell Me...”** In this activity, you will interview two people to find out how they use and integrate multiple planning tools.
- **System, System! Who Has the System?** In this activity, you will fill out your own System Builder.
- **Breaker, Breaker...Over and Out!** This activity will help you identify “focus breakers,” and help you discover ways to overcome them.
- **Wrap It Up, Please!** In this final activity, you will record your thoughts, feelings, and remaining questions about the workbook.

LISTEN UP!

INTEGRATING SYSTEMS AND KEEPING YOUR FOCUS

Listening

FOCUS: Achieving Your Highest Priorities CD

Disc Three: Tracks 4–6

Time Estimate

30 minutes

Food for Thought

Integrating your systems is not as confusing as it sounds. You've probably wanted to know how to use your computer and your PDA together, or your paper planner and your computer. This section will show you how it's done.

1. Think about some of the times you've been at a meeting without the information you needed, or rummaged in your purse or backpack looking for an address or phone number. How did it make you feel?
2. Are you overwhelmed by everything you have learned so far? What do you feel you're still missing in order for this system of prioritization and planning to really work for you?

GETTING DOWN TO IT—PART 1

INTEGRATING SYSTEMS AND KEEPING YOUR FOCUS

How Do I Integrate All This?

Technology and tools are useful and powerful when they are your servant and not your master.

STEPHEN R. COVEY—*FOCUS: Achieving Your Highest Priorities*™

Do you have a computer, but keep your schedule in a paper planner? If so, you're probably wondering how to integrate all of your information. The reality is that many people have multiple planning tools, but they don't know how to make them work together successfully. Perhaps that's why you chose to buy this CD set in the first place! Earlier you learned about the three keys to an effective planning system: it must be integrated, mobile, and personalized. Let's look at each of these characteristics in more detail and find out how to incorporate them into your planning system.

Integrating Your System

An effective planning system must be integrated. Even if you are not aware of it, you probably have more than one planning tool. Do you have a calendar hanging on the wall or a scheduling board on your refrigerator? Do you have a paper planner of any sort? If you answered yes to both questions, then you have multiple planning tools. Perhaps you use a computer-based planning system (possibly on both a desktop and a laptop) in addition to your PDA or paper planner. Some people use all three! There's nothing wrong with that—if you know how to make them work together.



It's important to find a planning system that keeps you organized, helps you focus, and minimizes distractions.

(Image © 2003 FranklinCovey.)

There are four possible configurations of planning systems. The first is strictly paper-based. Planning on paper is a great solution for many people. It's been around for a long time, and many people feel comfortable using it. One of the biggest advantages to a paper-based planning system is that it's the easiest to use for taking notes. Many people feel comfortable with a paper-based system because they are able to find and capture information more quickly than those using electronic devices.

Many of us are moving toward more technology-based solutions, at least in some measure. Therefore, the second configuration involves using a paper-based planner in addition to some sort of handheld device. There are many different varieties of PDAs

available to meet many different needs. If you don't have one, you might want to try one out. You'll know very quickly whether or not it's for you. Many times, people who travel for work use this configuration of two major tools.

The third configuration is a combination of paper and desktop computer applications. You may fall into this category if you spend the majority of your day at a desk. You may use Microsoft® Outlook®, or Lotus® Notes™, or Novell® GroupWise® as your scheduling tool on your computer. You keep information in these applications as well as on paper.

The final configuration is a combination of all three. This is what many "gadgetphiles" use. While they love new technology, they sometimes aren't aware of the best way to make it work effectively, and that's when technology starts to fail them. This section can help with that too!

The key to integration is finding the combination that maximizes productivity and minimizes redundancy. The last thing you want is to rewrite information in your paper planner. An integrated system uses complementary tools to ensure that the Core Four—tasks, appointments, notes, and contacts—are always accounted for.

Mobilizing and Personalizing Your System

A mobile component is another vital part of integrating your system. Have you ever been stuck someplace without information you really needed? If you have, you probably don't ever want to be in that predicament again. Obviously, your desktop computer is not going to be your mobile component, but a laptop or tablet PC could be. Your paper planner is mobile, as is a PDA. There are plenty of options for mobile planning components.

The last key to an effective system is that it be personalized. This is actually a fun thing to do! There are many options out there for you to choose from. You should be able to come up with an excellent solution that really works for you, not against you.

"Personalizing" your system doesn't mean having your initials engraved on the cover of your planner. Rather, it involves taking time to really learn about all the options available to you and then comparing those options to your lifestyle. Are you a single, working parent trying to make sure your kids get to school, lessons, and sports events on the right day and at the right time? Do you have meetings and appointments scheduled all day? If so, you need to make sure you use daily planning pages in addition to weekly planning pages.

If your daily life isn't filled with appointments, using only weekly planning pages might be right for you. Perhaps you've written down your values and goals but don't feel the need to keep them with you all the time. That's fine. Find a place to keep them where they're easily accessible for review, and you've trimmed down the size of

your planner to make room for something more important to you. The same holds true for electronic devices: you can customize them to suit your needs as well.

Whichever system you choose should make your life easier, not more difficult. Take the time to decide what you want and try it for a while. If it doesn't work, then try something else. Of course, FranklinCovey believes the Franklin Planning System is the best paper-based system; you can always modify another paper planner in order to use the concepts you've been learning in this workbook. Whatever you choose, make it work for you. That's what personalizing is about! Now let's take a look at how to customize your entire system once you've chosen your components.

GETTING DOWN TO IT—PART 2

INTEGRATING SYSTEMS AND KEEPING YOUR FOCUS

The System Builder: Customize Your Planning System

The System Builder is a great tool for helping you identify where “home” is for each of your Core Four. You’ll be completing this in an activity for this section, but to give you some understanding of what you’ll be doing, let’s look at an example of how the System Builder works.

The key question to ask yourself when filling in the System Builder is, “Which tool does what best for me?” Which of your tools best handles your tasks? Which tool will be the most effective at scheduling appointments, collecting contacts, and keeping notes?

In the System Builder, “H” stands for home and “M” stands for mobile. Home is where you store and back up information, for the most part. The mobile pieces are those you carry with you, transferring information to your home component at a later date. By filling in the System Builder, you identify which modality (paper, PDA, or computer) best helps you track each component of the Core Four. You also identify when you are able to access those different modalities.

A Customization Scenario

Anthony is a retail sales manager for a leading department store with branches in several areas. He spends a good deal of time on the road, away from his family. He is also a Scout leader, and loves to work out at the gym. Because he is on the road so much of the time, Anthony relies heavily on his PDA and laptop computer. Anthony’s completed System Builder looks like this:

H = HOME M = MOBILE	TASKS	APPOINTMENTS	NOTES	CONTACTS
			H M	
	M	H M		H M
	H M	M		M

As you can see, Anthony uses his PDA and his laptop for everything except notes. As technologically savvy as he is, he still finds it easier to take notes on paper (as do most people), so he carries his PDA in a binder that also contains notepaper. Both are always easily accessible. He also doubles up by having most of his tasks, appointments, and contacts in both his PDA and laptop. He is careful to synchronize them daily so they are always up to date. Doing this also provides him with a backup if one system crashes.

Once you’ve filled in your System Builder, you still may need to reevaluate it occasionally—especially if you’re into technology and keep buying new gadgets. Before buying anything new, however, ask yourself if the new device truly does any of the things on the System Builder better than what you currently have. If not, there’s no value in investing money in something new or different—unless you just want to play with it!

Dealing With E-Mail, Voice Mail, Interruptions, and Procrastination

Even if you’ve put the best system in place and implemented everything you’ve learned thus far, there are still some things that might get in your way. Now that you’ve filtered your daily activities through the Time Matrix, you’re probably seeing them more clearly, and you probably plan based on the Productivity Pyramid. You have all the right tools, but distractions still keep cropping up.

We call these distractions “focus breakers,” and we all experience them in one form or another. Interruptions are common focus breakers for most of us, and for many of us, procrastination often comes into play. If you have multiple e-mail and voice-mail accounts, they too can take your attention away from what you want to focus on. Let’s look at each of these focus breakers individually.

E-MAIL

E-mail is a wonderful thing. The use of e-mail has increased the speed of communication by leaps and bounds. We are no longer tied to “snail mail” when waiting for written responses to urgent requests. Unfortunately, on the flip side, it seems as though we can’t give our addresses to anyone these days without ending up inundated by spam and junk mail!

You probably have friends or relatives who send you chain letters and joke e-mails as well. If you are guilty of forwarding this kind of mail yourself, make a vow to stop right now! Your friends will love you for it.

There are many ways you can end this madness—or at least decrease it significantly. If your e-mail program provides you with a junk-mail filter, be sure to take advantage of it. You can also block spam by changing your address and closing out those junk-filled accounts. Ask friends to stop sending you jokes and chain letters. You can also set up a separate account for those friends and simply not look at what they send.

VOICE MAIL

“You have 15 new messages.” How depressing is *that* first thing in the morning? But for many of us, it’s a reality. Are you leaving messages for or getting messages from someone who is 10 feet down the hall from you at work? Why not just get up, walk over, and talk to the person? Human interaction is a good thing!

We’ve all experienced voice mails that are long-winded, incomplete, or garbled in some way. Concise, articulate messages are vital to good business communication. A little common sense goes a long way when it comes to voice mail.

One of the most important things you can do to decrease your stress over voice mail is to simply stay on top of it. Schedule time twice a day to check your voice mail—and stick to your schedule. If you work in a job that requires you to check voice mail more often, schedule it. Voice mailboxes typically hold a pretty significant amount of voice mail. How often is yours full? If you stay on top of things, this won’t happen. In turn, callers won’t be frustrated, and you won’t feel so overwhelmed when you do take time to go through your messages.

INTERRUPTIONS

“Oh, sorry. Did I interrupt something?” You probably get asked that a lot. How do you respond? Does it depend on who’s doing the interrupting? How hard is it to say, “You know, I am busy. Could we talk some other time? Let’s set up a specific time and place, okay?” You may find that the interrupter is very open and that scheduling another time to talk is fine with him or her. Don’t play the martyr. If you constantly allow others to interrupt you, then you deserve to be interrupted!

Of course, there are times when interruptions are necessary. It’s vital that you become skilled at deciding what is truly a necessary and vital interruption, as opposed to an unnecessary and untimely one.

Are you tough enough to put up a “Do not disturb—working under a deadline” sign on your door? Sometimes even a small change in your language can make a difference. The next time a family member really needs your attention, but you are pressed for time and know it could wait, try saying this: “You know, I really want to help you and spend some time with you, but I’m really busy right now. I’ll make a deal with you. Give me 30 minutes to myself, then I’ll take you to get those shoes you want. Is it a deal?” This takes discipline and practice, but you can do it!

PROCRASTINATION

For many people, procrastination is the hardest focus breaker to overcome. The tendency to put off until tomorrow what you could have done today is overwhelming at times. The “it’ll still be there tomorrow” attitude is a killer. Yes, it will still be there tomorrow, but so will other things, and they’ll just keep adding up. They aren’t going to go away just because you put them off.

Procrastination is all about you. You have to change your behavior. You have to change your mind-set from “I’m a procrastinator” to “I honor my commitments.” It may not be easy, but we’ll help you learn how to do it.

A key way to overcome procrastination is through goal planning. You learned how to do that earlier. If you schedule the steps toward achieving your goals and follow through on those goals, that, in and of itself, is a step toward decreasing procrastination. Another way is to faithfully use your planning system. Keep an eye on how many “arrows” you mark to forward tasks. Are there a lot of them? Many times this is due to procrastination. You’ll find other ways of avoiding procrastination in a later activity.

As you think about these specific focus breakers, take a look at the foldout job aid included in your CD set. It includes several ideas to help get you started on the road to improvement. The activities for this section will also help you start making some changes in this area. One thing you can’t completely control, however, is the amount of incoming information you receive. Let’s look at a great process for dealing with that.

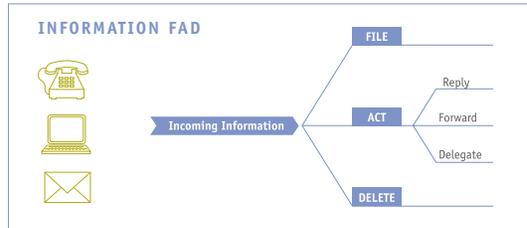
GETTING DOWN TO IT—PART 2

INTEGRATING SYSTEMS AND KEEPING YOUR FOCUS

Information FAD: File, Act, Delete

You will never again look at 80 percent of the information you are saving.
FERRIS RESEARCH, INC.—a market and technology research company

If you can relate to any or all of the focus breakers in the first part of this section, you are probably suffering from “information overload.” It’s a very common syndrome these days—stacks of paper everywhere, tons of e-mails, way too many voice mails. The main reason it’s a problem is because we just don’t know what to do with all of it.



For each new piece of information you receive, you should file it, act on it, or delete it. (Image © 2003 FranklinCovey.)

The process model that can help you address this problem is called “FAD.” FAD stands for “File, Act, Delete.” On the left side of this model, you see icons for the types of information coming in: voice mail, e-mail, and paper (snail mail) or any other type of paper information about which you need to make a decision). You have to make a choice about each piece of incoming information. Do you file it, act on it, or delete it? In making your decision, use the Time Matrix, which is used to assess where your time is spent and to filter out meaningless interruptions. If the information falls into Quadrant I (urgent and important), you act on it. If it falls into Quadrant II (important but not urgent), you can either file it or act on it. If the information falls into Quadrants III or IV, then it’s most likely not important and can be deleted. Deciding to act on a piece of information leads you to another choice: you can reply to it, forward it, or delegate it.

You’ll find a replication of the FAD model in the foldout job aid that came with your audio set. Keep it handy to remind you of how to handle information when you begin to feel overwhelmed!

FAD is a simple decision-making process that will help you avoid becoming overloaded with information, and builds on much of what you’ve learned throughout this workbook. When you’re in the habit of planning weekly and daily, and when you have a Prioritized Daily Task List that represents your highest priorities, you’re much better equipped to handle all of the information coming at you every day.

So Now What?

*Only one thing has to change for us to know happiness in our lives:
 where we focus our attention.*

GREG ANDERSON—author

You’ve made it! You’ve learned a new way of thinking about time and your choices with the Time Matrix. You’ve discovered the power of Quadrant II and found ways to gain more time in Quadrant II by better managing Quadrant I. You’ve worked your way up the Productivity Pyramid and learned how to gain more balance in your life.

You’ve defined your values and clarified them to gain a sense of direction for your life. You’ve learned how to set goals based on your values and developed a written plan for several of your goals. You’ve come to an understanding of how weekly and daily planning give you the power to live your life according to your highest priorities. And finally, you’ve learned the key components of an integrated planning system and how to make that system work for you.

So, what’s next? There are two things you can do that will help make this real for you. The first is to review and practice all the concepts you’ve learned. Make these things part of your daily life. The second is to retake the self-assessment you took in the first section. Give yourself 21 days to put these concepts and processes to use and then see where you are.

You have everything you need to enjoy a succession of successful, productive days. It’s just a matter of taking it one day at a time. If you apply the things you’ve learned, you will be focused on the right things: your highest priorities. Focusing on what truly matters to you will allow you to live, love, learn, and most importantly, leave a fabulous legacy. What could be better than that? The best of luck to you!

Food for Thought

1. In what ways could having an integrated planning system make your life easier?
2. Do you have too many planning tools that don’t work together, or not enough planning tools to make your system truly integrated, mobile, and personalized?
3. Why is the idea of an integrated system so important?

INTERVIEW ACTIVITY

INTEGRATING SYSTEMS AND KEEPING YOUR FOCUS

“So, Tell Me...”

The purpose of this activity is to help you gain an understanding of what planning tools others use and how they integrate them.

Time Estimate

30 minutes

Instructions

Interview two people you know personally or professionally who use planning tools of one sort or another (preferably multiple tools). Use the interview questions provided below to gather information. Feel free to add your own questions as well.

Interview Questions

1. What types of planning tools do you use?
2. Why did you choose these particular tools?
3. How do you make them work together in a way that benefits you most?
4. If you struggle with integrating your tools, what would you like to see happen so that they do work better for you?

Food for Thought

1. Do you think the people you interviewed were using their planning tools to their best advantage? Why or why not?
2. What seemed to be the biggest planning problem(s) for the people you interviewed?
3. How could the strategies you learned in this section have helped those you interviewed?

SELF-ASSESSMENT ACTIVITY

INTEGRATING SYSTEMS AND KEEPING YOUR FOCUS

System, System! Who Has the System?

Earlier you had a chance to see an example of the System Builder and how it worked for Anthony. Now it's time to fill out one for yourself.

Student Materials

- System Builder

Time Estimate

10 minutes

Instructions

Using the example shown in this section as a guide, fill out the System Builder by marking an “H” or an “M” in each box for each of the tools you currently use. Remember, “H” is for home and “M” is for mobile. Some boxes may not have any marks, and some may have more than one.

Food for Thought

1. What did you discover from completing this activity?
2. Is your planning system working for you or against you?
3. Is your planning system integrated, mobile, and personalized? If not, which of the three essential characteristics is it lacking? What can you do to change this?
4. What aspects of your planning system need to be changed in order to make it more effective?



FranklinCovey (NYSE: FC) is a global leader in effectiveness training, productivity tools, and assessment services for organizations and individuals. Our clients include 90 percent of the Fortune 100, more than 75 percent of the Fortune 500, thousands of small and mid-sized businesses, as well as numerous government and educational institutions. FranklinCovey provides professional services and products in 39 offices and in 95 countries worldwide.

FranklinCovey's purpose is to help organizations succeed by unleashing the power of their workforce to focus and execute on organizational priorities. We do this through a series of assessments, work sessions, and tools designed to get everyone focused on the few "wildly important" goals that, if achieved, make all the difference.

Core Products and Services

xQ™ Survey and Debrief (to help leaders assess their organization's "execution quotient")

Workshops

The 4 Disciplines of Execution™

FOCUS: Achieving Your Highest Priorities™

The 7 Habits of Highly Effective People®

The 4 Roles of Leadership®

Planning Systems

Tablet Planner™ for the Tablet PC

PlanPlus™ for Microsoft® Outlook®

FranklinCovey® planning software

Palm® OS and Pocket PC software

Free Trial Versions

Tablet Planner software,

www.franklincovey.com/tabletplanner

PlanPlus for Microsoft Outlook,

www.franklincovey.com/planplus

Speaking Engagements

Contact the FranklinCovey

Speakers Bureau:

www.franklincovey.com/speakers,
or call 1-800-240-1706.

Information on all other products
and services:

www.franklincovey.com/forbusiness

2200 West Parkway Blvd.

Salt Lake City, UT 84119-2331

U.S.A.

1-800-868-1776

International: 001-801-817-1776

Fax: 001-801-342-6664

STEPHEN R. COVEY



Dr. Stephen R. Covey is co-founder/vice-chairman of FranklinCovey, a leading global professional services firm. FranklinCovey offers learning and performance solutions to assist professionals and organizations in significantly increasing their effectiveness in productivity, leadership, communications, and sales. Dr. Covey is perhaps best known as the author of *The 7 Habits of Highly Effective People*, which is ranked as a No. 1 best-seller by *The New York Times*, having sold more than 13 million copies in 36 languages throughout the world. The book's message has created lasting impact—its sales keeping it on numerous best-seller lists for years. Dr. Covey is an internationally respected leadership authority, family expert, teacher, and organizational consultant. He has made teaching Principle-Centered Living and Principle-Centered Leadership his life's work.

In 2002, *Forbes* named *The 7 Habits of Highly Effective People* one of the top 10 most influential management books ever.

A survey by *Chief Executive* magazine recognized *The 7 Habits of Highly Effective People* one of the two most influential business books of the 20th century. Dr. Covey also authored the book *Principle-Centered Leadership* with sales exceeding one million. *The 7 Habits of Highly Effective People* audio book on tape is the best-selling nonfiction audio in history, selling over 1.5 million copies.

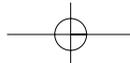
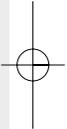
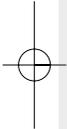
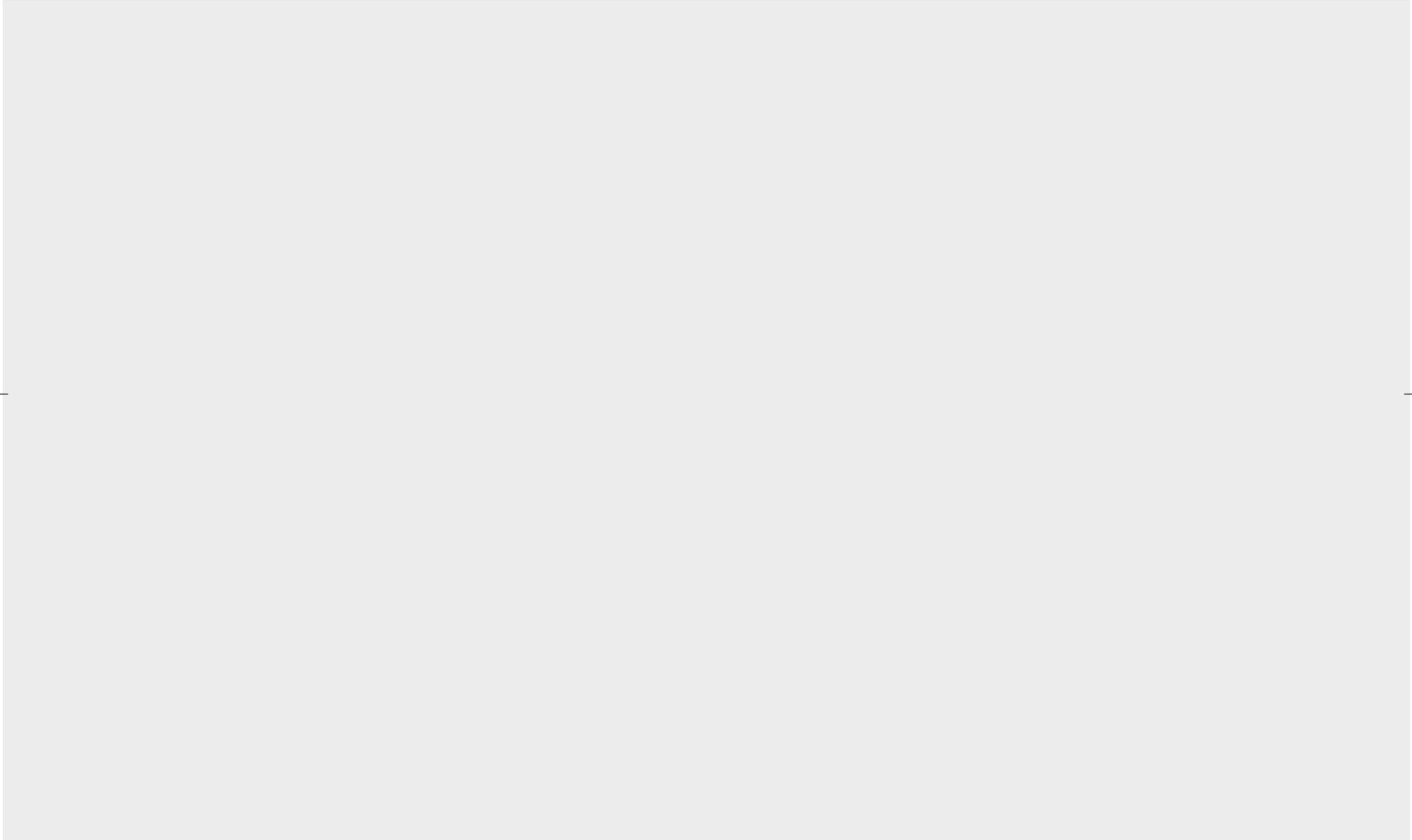
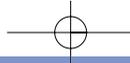
First Things First, co-authored with A. Roger and Rebecca R. Merrill, doubled the first-year hardcover sales of *The 7 Habits of Highly Effective People* in the same time period. Over two million copies have been sold. Simon & Schuster expressed the opinion, "*First Things First* is the best-selling time-management book ever."

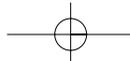
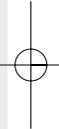
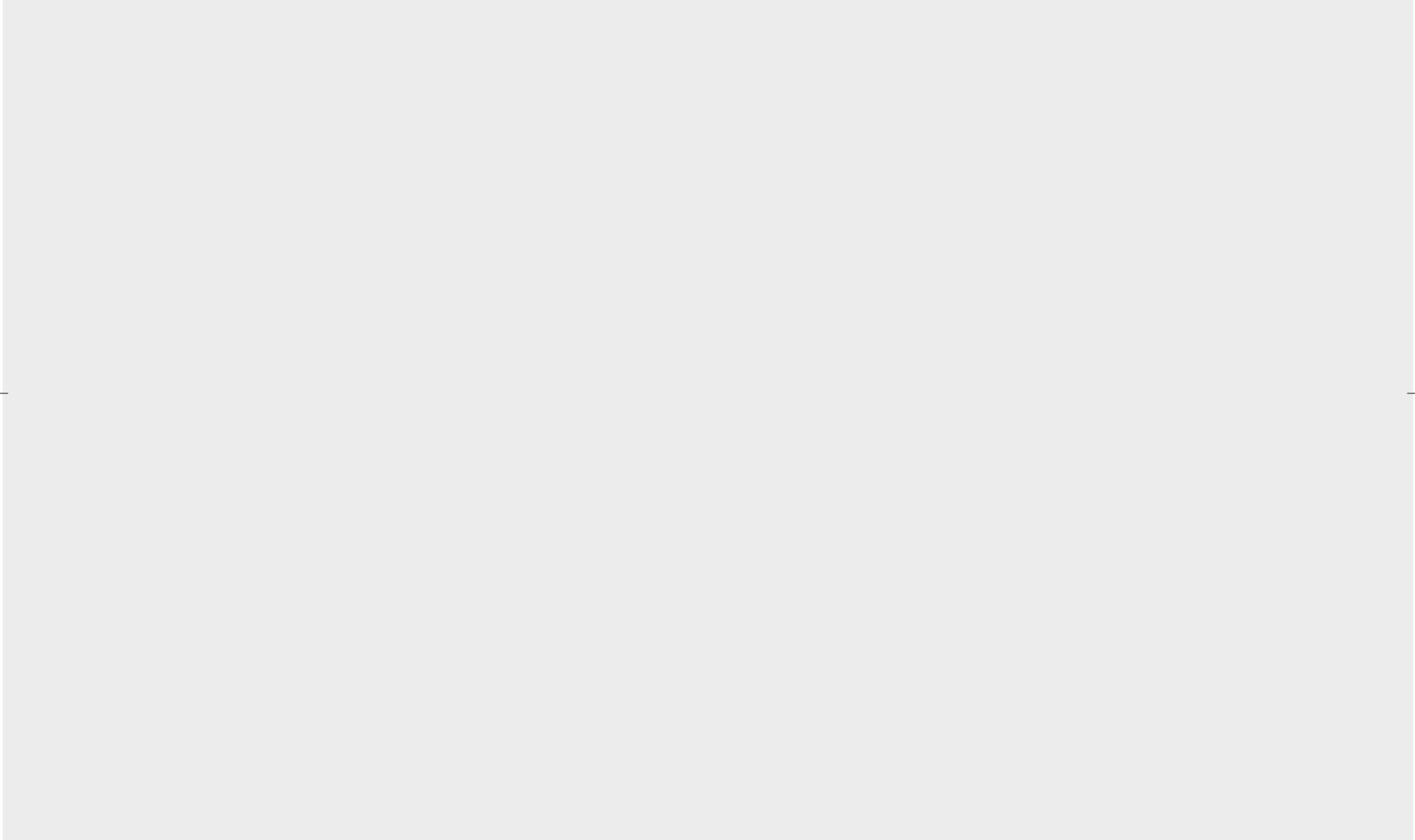
Dr. Covey's book, *The 7 Habits of Highly Effective Families*, was released in October 1997 and ranked fourth on *The New York Times* list within three months of its release date. It is one of the No. 1 best-selling hardcover books on family. His newest books are *The Nature of Leadership*, co-authored with Roger Merrill and Dewitt Jones, and *Living the 7 Habits: Stories of Courage and Inspiration*.

Dr. Covey is the recipient of the Thomas More College Medallion for continuing service to humanity, and has been awarded seven honorary doctorate degrees. Other awards given Dr. Covey include the Sikh's 1998 International Man of Peace Award, the 1994 International Entrepreneur of the Year Award, *Inc.* magazine's Services Entrepreneur of the Year Award and, in 1996, the National Entrepreneur of the Year Lifetime Achievement Award for Entrepreneurial Leadership. He has also recently been recognized as one of *Time* magazine's 25 most influential Americans and one of Sales and Marketing Management's top 25 power brokers. Dr. Covey is currently serving on the board of directors for the Points of Light Foundation.

Dr. Covey earned his undergraduate degree from the University of Utah, his MBA from Harvard, and completed his doctorate at Brigham Young University. While at Brigham Young University, he served as assistant to the president and was also a professor of business management and organizational behavior.

Dr. Covey's organizational legacy to the world was Covey Leadership Center. On May 30, 1997, a merger with Franklin Quest created the new FranklinCovey. Dr. Covey's vision of empowering organizations to implement Principle-Centered Leadership in their cultures will continue to be an important focus of FranklinCovey (www.franklincovey.com).







*No life ever grows great until it is
focused, dedicated, and disciplined.*

—Harry Emerson Fosdick