



The essential companion for a high impact life

Rebecca's Weekly Planning Routine

Starting a weekly planning routine is the first step in moving from chaos to progress. I like to break mine into two parts.

Part 1: Friday Morning

Doing this on Friday (rather than the weekend) allows you to schedule or reschedule meetings while people are still in the office. By Friday, you will already know if you need to push tasks from this week into the following week, so it means that you show up Monday morning already knowing the most important tasks of that day. The below 6 steps end up being iterative as they are interrelated.

1. Read Monthly Goals & Monthly Plan.

Read your Monthly Goals which will remind you what you are trying to achieve and review your Weekly Goals from your Monthly Plan to see whether reality is matching up to plan.

2. Reflect on your accomplishments.

Use the Weekly Notes Section to tally what you achieved during the week. Celebrate your achievements and increase accountability by reflecting on what you can improve next week.

3. Write Weekly Layout for the 2 upcoming weeks.

Write (in pencil) all meetings for the next 2 weeks in the Weekly Layout. For myself, I only include formal meetings - I don't use this for time blocking, reminders or kids' stuff. This layout shows external commitments of my time only. As you do this you can

- a. Reschedule or cancel any meetings that are in conflict or are no longer a priority;
- b. Confirm any meetings that were set long ago;
- c. Book restaurants and/or arrange meeting places, as needed;
- d. Ensure there is enough time for self-care including exercise, relationship time;
- e. Clarify agendas and/or request relevant information ahead of meetings; and
- f. Review "blank space" to consider when you can complete other tasks.

4. Time block the Daily Pages.

Time block the first few days of the week: definitely for Monday, probably Tuesday and usually Wednesday and plan to get through as many of your goals for the week early. This can include both formal meetings as well as planning for blank space including habits, reading and writing.

5. Task Sweep

Look back at any uncompleted tasks from the Top 3 and To Dos from this week's Daily Pages. Review the Braindump to see if any of those items need to get done this week. Then write any time specific To Dos on the exact day you plan to do them.

6. Set Weekly Goals

Set your Weekly Goals incorporating items from Monthly Plan, Weekly Layout and Braindump.

7. Sanity check

Plot tasks related to your Weekly Goals on the Daily Pages of the week. I am often overly ambitious in thinking what I can get done, so it helps me to plan when exactly I will actually complete the relevant tasks to meet a Weekly Goal and adjust accordingly.



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Part 2: Saturday Morning

Since I am the planner of the family, my husband is on duty with the kids on Saturday morning while I take a couple of hours to plan everything for the family for the upcoming week. This will be different for each person depending on their stage in life, living situation, family structure and goals. I encourage you to ask yourself what you need to do each week in order not to spend a chunk of time planning or rushing around during the week. For me, it includes the below. I rarely do 100% of the items each week, but these are the things I check each week to see if I need to do them and I try not to look at it again until the following Saturday morning.

1. Meal Planning

After reviewing how many family members will be at dinner each night of the week, I choose one cookbook and pick recipes from that book which include: protein, veggie, carb. Usually for us I plan Monday- legumes, Tuesday- fish, Wednesday- chicken, Thursday- pork, Friday- beef, Saturday- pasta and Sunday- feast! Then I quickly make a shopping list for any ingredients for the recipes as well as staples needed to restock the fridge, freezer and pantry.

2. Read School Blogs / Newsletters

I read each child's teacher's blog and the school newsletter and add reminders to the relevant Daily Pages in the HALO planner. Any field trips, costumes or special equipment needed added to Brain Dump or Daily Page as appropriate. Sometimes I will just order things right then. I send reminders of these to our Family WhatsApp Chat, so everyone has the same information.

3. Monthly Look Ahead

I scan the whole month I see if there is anything I need to do in this upcoming week to prepare ahead. For example, if there are two birthday parties at the end of the month, I add buying both gifts to the Daily Tasks List on the day that I am already in the vicinity of the store.

4. Organize Playdates

I look for any free time the kids may have in the upcoming two weeks and organize playdates in the upcoming weeks. I keep a list of playdates they have requested, but also ask them on Saturday morning. By mid-year I know most of their friends' schedules, so I know who is free on Wednesday afternoons and send messages to the parents to see if the kids are free.

5. Plan Childcare Schedule

I am blessed to have wonderful childcare. After I have done the week's plan, I type up a play-by-play childcare schedule for each day, including who is doing what activity, when and with whom and send it to our Family WhatsApp Chat, so everyone is on the same page.

6. Exercise Planning

Currently I am doing a lot of self-driven activities for my exercise, but if I want to book a class, coordinate with a friend or book a training session for the upcoming weeks/months I do it here.

7. Saturday Basket

Inspired by Lisa Woodruff's [Organize 365](#), on Saturday morning I deal with all the physical paper that has come into my life through the week. I have reorganized the top right-hand drawer of my desk to collect all the mail, receipts, etc. which accumulate. I read notices, scan anything which needs scanning, and throw everything else away.

8. Finance Review

On a weekly basis I look at my main bank account and credit cards and record those expenses in my budget tracker. I also record (and then throw away) any receipts in my top desk drawer and go through any cash expenses on the day (usually at the top right) in the HALO Planner.

9. Monday Planning

If I am really going to rest on Sunday (no phone, no planning, no work) I need to be prepared for Monday by Saturday afternoon. So even if I don't do time blocking or outfit planning for the whole week, I make sure I do it for Monday.

10. Schedule People to Meet, People to Call

In the Back Pages, I keep a list of people I want to meet or call. I will review that list and reach out to people to get on their calendars in the coming weeks.

11. Inbox Zero

I am not really an Inbox Zero person, but I will often use this time slot to go through and answer unanswered email and add dealing with important work-related items (like reviewing documents) which got lost in my email to my to-do list on whatever day I have blank space.

12. Thank You Notes

I review the meetings I had the previous week and get current on my thank you notes.