

SETTING UP A NEW PLANNER

Setting up a new planner can be intimidating if you have never done it before. Let's look at how to make the process much easier.

There are 3 elements to working with a planner:

- 1) ensuring that you have all the **components** needed
- 2) the mechanical task of **assembling** the components into a usable system
- 3) **self-training** to develop the discipline and habit of using the planner; this is the hardest part.

Components

As I wrote in *Making Life Easier*, the essential components that everyone needs whether their planner system is paper or electronic are:

- contact and other information
- appointments
- to-do lists, including project tracking
- blank paper or space for jotting down ideas as soon as they arrive

Assembly

For paper systems, the physical assembly part is simple: decide whether your appointments calendar should go in front of or behind the information (contacts) pages, then put it there. The contacts section are alphabetical pages used for keeping track of people or vendors. However, in between the lettered pages one can slip in pages that track other kinds of useful information:

- health questions to ask your doctor
- projects
- staples lists for shopping
- books that you want to read, places you want to go
- ideas
- measurements of areas of your home (such as a window for which you might want to find new curtains)
- computer specifications (such as software versions, printer cartridge type, or other information that might be handy to have in an easy-to-find place)
- inspirational quotations for spur-of-the-moment uplifts

For electronic planners, rather than interspersing this information with your contacts information, you would probably need a separate memo for each type of information.

Contacts and other information

When entering your contacts information in a paper system, it may be helpful to list stores and other business contacts separate from your personal contacts. This makes it easier to find numbers that you need. If you have a lot of business contacts that fall under a single heading (such as Apple stores and Apple care for Mac users, or whatever departments you interact with at Kaiser for Kaiser members), giving these numbers a separate page will make finding them easier and leave more room on the regular page for general contacts.

Appointments

Over the years, I have found it useful to put the monthly pages (2-pages per month, usually with lines on the back where tasks or projects for the coming month can be listed) for the entire year in my binder, but only the daily pages for the current month and the next one coming up. The rest of the pages for the year are kept in a storage binder. This arrangement permits the best mix of planning space versus weight. To lighten the weight, I also remove the pages for the 1st half of the month when reaching the 15th; I double check before removing these pages to make sure that I haven't overlooked some task that needed to be carried forward.

To-do Lists

Where you put to-do tasks depends upon your format. For a paper system, if you use a 2-page per day format, a separate page can be dedicated to your task list. For a 1-page per day system (assuming you can find this *rara avis* anymore – if you do, please let me know where you found it), you will need to put your to-do list on the same page as your appointments. For a 2-page per week format, you will likely need to keep separate pages before or after the week or the month; this is a bit messy as manufacturers do not usually leave a blank page between the weeks or even the months. On the other hand, you will not need to carry items forward as much as on a daily system.

It is difficult to easily assign tasks to specific days on electronic planner systems. They make you slot them into particular hours which is awkward and usually unrealistic. There is not usually any way of checking off tasks – you just delete them, which seems less emotionally satisfying, a less endorphin-generating activity than checking them off and having the growing satisfaction of seeing more and more checked items as the day progresses. (Never under-estimate the power of endorphins!) If listing your tasks on the calendar of your electronic planner is too much hassle, it might be better to use a memo, but then you have to keep flipping back and forth between your calendar and your task list. Perhaps now there is some app that will resolve this dilemma.

Training

No matter how good your system may be, it will not help if you do not use it. Like every new skill or habit, it will take time, patience, and persistence to make it a consistent and dependable force for positive change in your life. The key to training yourself to use it is to set up your surroundings to help. Here are some tips and tricks that will help ensure that you become consistent with this new discipline:

1. Keep your planner in a place where it is easy to check, add new items, and check off tasks as you do them (yay!) throughout the day. This might be on your desk, a table where you drink your coffee or tea, or any other frequently visited location.
2. Keep your planner open to the page for the current day. It can only help if you look at it often.

3. Carry forward any unfinished tasks from previous days (do not let this get you down). If you have many unfinished tasks each day, re-evaluate your expectations for what can be accomplished in any given day. It might be better to list some tasks for later in the week or the month, rather than putting yourself under so much pressure by scheduling too many things each day.
4. Congratulate yourself for each item that you are able to accomplish.
5. Check your planner as early as possible each day.
6. Give yourself a reward for checking your planner and updating it (if need be) in the early morning - 2 squares of super dark chocolate, a do-it-yourself massage, a gold star, or whatever else will make you feel rewarded.
7. List even the most basic daily tasks (such as exercise, dishes, relaxing, or writing in your journal) on your pages for each day until they become so automatic, routine, and dependable that you never miss doing them, and failing to do them would be disturbing.
8. Always keep your planner with you so that you can jot down ideas, things that you need to get, discuss, or do, new contacts, or appointments that you make.
9. Every time you think of a new task that you need to do, list it in your planner (not necessarily for today, but for when it would be most beneficial and realistic to get it done) immediately before you forget it. The idea is to free your mind and memory by listing everything – put the burden of remembering to do things on your planner, not on your mind.

For more on choosing a planner, see the article on my website:

<http://optimalorganizations.com/ARTICLES/Nov10.html>