Monthly Planning Party Worksheet

Welcome! It's time to plan the next month together, let's get started!

Before We Begin

- ❏ Have you watched the welcome video? Be sure to watch it before you continue!
- ❏ Gather all of the planning supplies you need: calendar, notebook, pen, annual goals and priorities, current projects, task management software
- ❏ Eliminate as many distractions as possible (close those tabs, remove notifications etc...)
- ❏ Get ready to plan!

Reflection

Let's reflect on the last month.

Ask yourself some or all of these questions:

- *What am I grateful for?*
- *What were some highlights?*
- *What did I learn about myself? Others? Family?*
- *Were there any major milestones? What did I do to celebrate/record?*
- *What do I need to adjust?*
- *What do I need to stop?*
- *What do I need to start?*
- *What part of the planning process went well?*
- *What part of the planning process was challenging?*

Priorities

My vision for this year

My word for this year

Goals and/or priorities for this year

Top 3 priorities for this month

Planning

Choose 1 priority to create a detailed plan for.

Project Plan: decide direction, identify constraints, define key phases, create detailed plan

Daily and weekly actions

Scheduling

Create a timeline for your project plan.

Add deadlines and time blocks to work on your project in your calendar.

Go through your calendar chronologically and confirm every event and deadline

HOMEWORK:

- Review your weekly schedule that supports you in accomplishing your priorities this month (include your daily and weekly actions, evening themes)
- Block off 1-2 hours in the next few days to complete your plan and scheduling for the next quarter
- If you use PowerSheets, be sure to do your prep work and tending list before the month starts