**YGT episode 219**

You're listening to, you've got this episode 219. Um, welcome to you. You've got this, a weekly podcast for higher education professionals looking to increase their confidence and capacity for juggling the day-to-day demands of an academic life. I'm your host, Dr. Katie Linder on this episode. And I thought I would share about my 2021 planning tools.

And in part, because last year I did an episode on this and people really seem to like it. It was helpful for people to hear all the different tools that I was bringing into my planning for the new year. Now this year, I have quite a few less tools than last year. I think last year I had like nine things that I was using for planning this year.

I have. Five that I want to share. And of course, if you have listened for a little while, you know, that I recently took a turn into more digital planning, um, as of 2020. And so you're going to hear about some digital tools that I'm using this year to plan. So the first thing I wanted to mention is power sheets.

And this is a tool that I've been using, I think, for about a year and a half now. And, um, I have a blog post that I recently published about why I'm choosing to use this tool again in 2021. So I will link to that in the show notes, in case you want to take a look. But power sheets are basically a tool that allow you to do annual planning, but also to break that planning into months and quarters.

And it's kind of a sweet spot for me because I do a lot of longterm long range planning and also a lot of like weekly planning, but not necessarily thinking about things from the quarter perspective or the month perspective. And I've really appreciated having a tool that kind of reminds me to do that.

So power sheets also has, um, I think about 60 or 70 pages in the beginning. That are kind of just, um, helping you to think through and reflect on the previous year plan for the coming year. Think about goal generation and what you might want to be thinking about. And I have not yet done that prep work, um, for 20, 21 as I record this, but I will be doing it soon.

And it's definitely one of the tools that has become, um, a really helpful one for me, not just at the beginning of the year, but to really be thinking about throughout the year about how my goals are maybe shifting and changing, um, as the quarters as we move through the quarters. And also, am I needing to leave any goals behind am I needing to add new goals in?

Um, so this is definitely a tool that I can, I can recommend at this point. The second tool that I really pulled into my planning this year. And I think I did this last year as well, but I didn't explicitly talk about it. Is my events calendar for my business. And this is something that I really start to put together usually in the fall of the previous year.

So this fall around October, I started to pull together what, what is the event schedule for what we're going to be doing in the business in 2021? And this includes things like, um, dates for slow hustle. This includes the coach training schedule and curriculum. Um, this includes, uh, things like, uh, events that I'm doing in prolific.

So there's a lot of different things that go into this. And some of these things got mentioned in a previous episode that I talked about 20, 21, um, events and programs. So I can link to that as well. But as I'm doing my planning, part of what I'm trying to do is kind of look for the rhythms that are happening throughout the year.

Where I'm either going to be like really busy with something, or I'm going to have a little bit of a low. And it helps me to just kind of think about where my goals can fit in from quarter to quarter, if I'm trying to take on some extra stuff in terms of, um, things like the yoga teacher training I'm doing right now, or other kinds of personal or professional development that I might want to do in the future.

So the third tool that I have been using throughout this year. And it's, it's one that I've talked about in the past in a more general way. Um, but not specifically the one that I'm using now, and that is that I have created a thousand day plan and I created this back in may of 2020, and I've been working with it and kind of honing it over time, um, throughout this year.

But it's something that I look at pretty much every day. And a while back, uh, maybe a couple of years ago, I did an episode on creating kind of these longer-term plans. And I think I called it a thousand day plan at that point, but it's easy to do this with like a 500 day. Um, and the idea is really just to give yourself a, a longer period of time than a year.

Um, and with a thousand day plan, we're talking, you know, roughly almost three years, um, to complete the things that you have in the plan. So I created a template in notion for myself. And I'll walk you through some of the things I've included in that template. There's actually a version of this template that I've included in the retreat that I'm offering this winter for participants.

And it's basically like an annual plan. So I took my thousand day plan and turned it into an annual plan. Um, but here's some of the things that I'm considering the first is at the top. I have this spread that basically is. What I consider a meaningful metrics of what I'm looking at for the year. So the kinds of things that I'm measuring in 2020 include things like, um, the number of books that I've read this year, our annual business revenue, the mortgage payments that we're making, because that's one of my big goals right now is paying down our mortgage.

Um, the number of coaching hours that I've completed. The number of hours I've had for teaching yoga, because that's something I'm tracking right now. And then some of the enrollment numbers for some of our upcoming programs I'm tracking. And, um, also just some things of like checking a box of like, did I do it?

So passing the PMP exam was one of the meaningful metrics that I had for 2020. Underneath that I have, uh, what I'm calling monthly milestones. And these are basically each month. I usually have one thing that I'm really kind of focusing on. So for example, in December of 2020, it was launching the virtual planning and yoga event.

That was kind of my, my big thing that I was focused on in January of 2021. It's launching the coach training and slow hustle cohorts in February. I'm graduating from my 300 hour yoga teacher training. And then in March, I'm really focused on, um, applying for accreditation for my coach training program.

So there's always kind of something that is a focus for that month. And I like to keep that in mind, as I'm thinking about the coming months and, and where I want my energy to go. Underneath that I have a section that is focused on my vision and my values. And this is really kind of a space for me to think big picture about how am I making decisions and thinking about future directions with projects and with where I'm prioritizing my time and my resources and my energy.

And it's a way to keep me kind of centered and grounded as I'm thinking through a lot of different possible things that I could be doing in the future. So this is an area that I've spent quite a bit of time developing. I also kind of tweak it and iterated a lot to think about, um, have that vision for my life is changing or if my values are shifting direction.

Um, so I have areas for those things. And then underneath that, I have an area that I call current focus or on deck projects. And these are the things that are like I'm working on right now. So I'm right now, it's on this list is my winter break planning retreat, uh, the virtual planning and yoga retreats that I'm offering some coach training facilitation that is happening over the next several months.

And then my 300 hour yoga teacher training program that's currently happening. Next to this area. I have a section that I call future project ideas, because I feel like I have a, I need a place to just put like all the ideas that I have that I may or may not act on, but it allows me to keep them all in one spot so that I can be kind of looking at those project ideas and deciding if there's something there that I want to be, um, prioritizing as I move forward.

So I have a section for that. And then underneath all of these things, I have a, what I call like project bucket categories. And I've broken them out by year because this is the thousand day plan. So I have sections for yoga business, coaching, the house and our finances. And then under each year, I've put kind of to do's of what I'm hoping to accomplish that are tied in with my larger goals for each of those areas.

I also have a section, um, down at the very bottom of this, where I'm noting some of my accomplishments that are related to my work, um, in my day job kind of like what I would put on my CV over time. And if there's areas that I want to expand or grow in, I have some of that, um, noted here as well. So this is basically in some ways, kind of like a dashboard that's helping me to think in a bigger picture way.

Am I moving forward with the goals and priorities that I care about? Are they tied to my vision and values? And how am I kind of enacting that on a day-to-day basis? So, um, I know that's a long explanation, but this is basically a, a pretty major tool that I've been using this year. That I've really personalized to the things that I care about.

Um, and like I said, a version of this tool is part of what's included in the retreat so that people can download the notion template and, um, kind of experiment with it for their annual goal setting. Okay. So I've got a couple other tools that I'm using as I think about, um, planning for 2021. One is, uh, the task list that I've created in notion.

And this is basically a master task list where I put everything that I. Need to be kind of remembering to do, um, now and into the future. And I have a way of segmenting these tasks by the area of my life that they're taking place in. So for example, there's some that are for my day job. There's some that are for our business.

There's some that are more personal and it allows me to then, um, filter the task lists and look at them in different ways. I give every task a deadline. So that when I am looking at my weekly schedule, I can narrow it down to just the tasks that I want to focus on for this week. Um, but one of the things I'm planning to do over my winter retreat is to kind of preload a bunch of tasks for 2021 that are more recurring tasks.

So I don't have to think about them, um, over the course of the year. So some of these things include, like checking my website on a monthly basis to see if there's any updates that I want to be making there. Um, there's, uh, some monthly tasks that I do associated with kind of closing out our bookkeeping for our business every month.

And those kinds of things are going to be put into the task list and they'll help me kind of see, again, some of the rhythms that are happening throughout the year. And then the last planning tool that I wanted to mention is also a notion, and this is my weekly planning templates. And again, this is something that I started creating in February and have been using throughout the entire year.

And the template is basically, um, a digital planner. It allows me to have my task list and a spread that shows me on a day to day basis. Like what might to do items are each day. I also use it to plan kind of my top three priorities for the day that I want to focus on. And then I use some of the properties it's, it's created in a database in notion and some of the properties help me to track things like what are my highlights or wins from the week?

Or were there any low points from the week that I want to note as well? So using this weekly plan has really been helping me to make sure that I'm focused on the to-dos that I want to get done every day. And that I'm able to track what is getting checked off and then move deadlines around if I need to do that.

So it's definitely a tool that I'm, um, planning to continue using as I move into 2021. And as I, um, just keep. Trying to think about all the different kind of layers of focus that I'm trying to have, whether it's daily, weekly, monthly, quarterly, or annually, or this thousand day plan, there's all these different kinds of ways to look at what I'm trying to prioritize and what my goals are to make sure that I am actually moving things forward in a way that I would like.

So I will list again, these tools in case you're interested in exploring any of them yourself. So the first one is power sheets and I'll go ahead and link to that in the show notes. The second one is my events calendar that I'm using within my business. The third one is the a thousand day plan that I created in notion.

The fourth is the master task list that I'm using in notion. And then the fifth one is my notion weekly planning template. So as you can see, I feel like a lot of these things, um, have been really personalized to me and to how I plan and how I manage projects and tasks and time and all of these kinds of things.

So I would very much encourage you to think about what are the planning tools you're thinking about using for 2021. And I would love to hear if you want to share them with me, because I think we're all using pretty personalized tools at this point. And I always love to hear what other people are up to.

So you can always email me at hello at Dr. Katie linder.com. You can tweet to me at Katie double underscore Linder. You can connect with me on Instagram at Katie underscore Linder, any way you contact me. I always love to hear from you. Thanks for listening. Thanks for listening to this episode of you've got this show notes and a transcript for this episode can be found at Dr.

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