Ultiself

11 Keys to Planning for Maximum Productivity

The UltiSelf Definitive Guide to Planning

Proper Planning Prevents Poor Performance

You most likely already have a daily planning system that you use. But is it truly optimal?

We are all limited by the same 24 hours. You, Bill gates, Larry Ellison, Elon Musk, that homeless guy by the liquor store asking for spare change, the middle class guy who lives for the weekend and the out of shape workaholic working himself to death.

> 🔑 **The key to success is getting the most from those 24 hours.**

Energy and motivation has some impact on, but, believe it or not proper planning makes a huge difference.

There is a very good chance that you are not taking certain psychological and scientific principles into account when planning your days. And there is an even bigger chance that it is impeding your productivity and preventing you from accomplishing your goals.
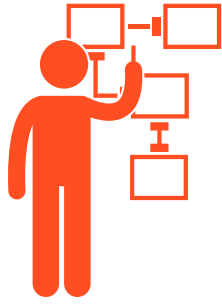
In order to plan your day properly you need to understand some key planning principles and follow the right planning system. This will allow you to maximize your productivity and get to your goals as quickly as possible.

To make sure that you are not just busy but actually are productive and truly accomplishing your goals check out this guide. You will be really impressed by how much your productivity will improve and how much faster you will move toward your goals.

Planning Principles

Stay in Line with your Goals Tasks and Objectives

The main purpose of planning for productivity is to accomplish your goals with the minimum required effort and stress.

Many people have a tendency to be busy just for the sake of being busy. They are always overworked overstressed and never accomplish anything.

For this reason it is critical to never lose sight of your overall goals and the key objectives to accomplish them.

We all have 24 hours in a day. Some of us can move mountains in those 24 hours while others can barely accomplish anything.

A big reason why is improper goal, objective and task setting.

The first step to planning is to identify YOUR RIGHT goals. To learn how to do that check out the <u>Ultiself Definitive Guide to Goal Setting</u>.

Once you have the right goals in place identify the key objectives needed to accomplish those goals.

Your planning will consist of identifying the critical tasks needed to achieve your objectives and the critical times to do those tasks.

As you work, never lose sight of your overall goals and objectives. Always have them visible.

For every task that you are doing identify which goal it is moving you towards, how and by how much. If something doesn't add up for a task maybe you should not be doing it.

Review your goals and objectives, at least, weekly. This can look different for everyone, but some studies have shown that you are more likely to achieve your goals if you review them everyday.

Some people read them aloud when they wake up in the morning, or right before they head to bed.

The key here is to really think strategically. Almost think backwards. Make sure that you have set the right goal(s) for yourself. Determine the most critical objectives to get to those goals and now look for the key tasks. The rest of this guide will show you how.

Here is a timescale to look at when dealing with goals, objectives and tasks.

Values	Infinite
Goals	1-3 years
Objectives	1- 3 months
Tasks/Habits	1-5 days

Planning Fallacy

Nobel Prize winning psychology researcher Danniel Khanneman has a term called **"The Planning Fallacy."** To sum it up, people usually overestimate what they can accomplish in a specific period of time. Think of most tech development projects or even the famous Big Dig in Boston. Even on the highest levels things just usually take longer than planned.

This also goes for planning your days. Plan too much and you automatically set yourself up for failure and overwhelm.

So, set yourself up for success. Spend a lot of time thinking if that task you planned is REALLY necessary. If so, can someone else do it?

It is best to choose no more than two to three substantial tasks for a particular day. And don't just choose tasks that you know you will not be able to accomplish. It will just mess up your planning, frustrate you and lower your self efficacy.

Keep in mind it is better to overachieve and build self efficacy than to underachieve. If you feel that you can start to do two to three tasks per day without a challenge, go ahead and up your task base. Knowing your limits allows you to prioritize very carefully.

80-20 Rule

We established that you have to keep sight of your goals and objectives when planning.

Because of the harsh reality that you can only accomplish 2-3 major tasks per day. You need to identify which tasks on your todo list will have the greatest impact in moving you towards your goals and objectives.

Think of the Pareto principle also known as the 80-20 rule. About 20% of your objectives will get you 80% of the way towards your goals. And about 20% of your tasks will get you 80% towards accomplishing your objectives.

If you can identify the 20% of the tasks to really focus on and more importantly the 80% of the tasks NOT to focus on it will be a massive step towards success.

A very successful lawyer once told me a great line. **"A successful lawyer is determined by the legal work he does NOT take rather than by the work he takes."**

The action plan here is:

- ✔ Look at your goal.
- ✔ See yourself accomplishing it.
- ✔ Identify the key steps and objectives towards accomplishing your goal.
- ✔ Now look at your tasks.
- ✔ Identify which tasks are not critical to get you to your goal and your key objectives.
- ✔ Either erase them, defer them or have someone else do them.

Most Important Task (MIT)

Now that we established what NOT to do. Let's determine what to do.

Basically everyday needs to have a specific critical WIN task that you must get done.

What is WIN? WIN stands for What's Important Now.

This is your most critical task…. that you have to do that day…. to get to your most critical next objective…. that is essential to get to your goal.

Go back and read the last sentence through again. It is critical. This is your Most Important Task (MIT) for that day.

Take the time the night before to really identify your most important task for the day ahead. And attack it ferociously first thing in the morning.

Before you do anything else for the day focus on this task and only on this task. Do not think backwards or forward. This task is your most critical mission.

In his book The Way of the SEAL, Mark Divine refers to this as front side focus. This is a principle that Navy SEALs use to stay focused on the next task at hand.

This task has to be so important that if you just accomplish this task you can consider the day a win. Once you complete your MIT, you can do the rest of your big or small tasks.

To learn more about identifying your MIT check out our Definitive Guide to Optimal Productivity.

Urgency and Punishment Conditioning

Let's face it, retiring or dying without accomplishing your goals is a tragedy. Especially if you have talent.

In order to prevent that from happening you need to have a huge sense of urgency.

It is essential that you never forget the fact that your time is limited. This will give you a sense of purpose and urgency, both of which can drive you to get the most of each day and to move aggressively towards your goals.

One great way to put things in perspective is to identify how many work days you have left before your goal accomplishment deadline and before your retirement. Have that number visible in front of you at the end of each day. The ritual will really make time tangible and engrain in your head that it is limited. This will create the massive sense of urgency that you are looking for.
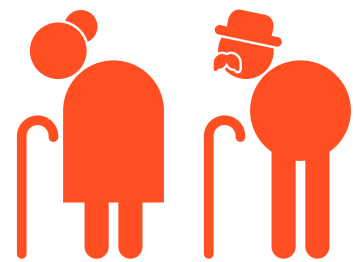
Brandon Webb, another former Navy SEAL talks about this strategy in his book Total Focus.
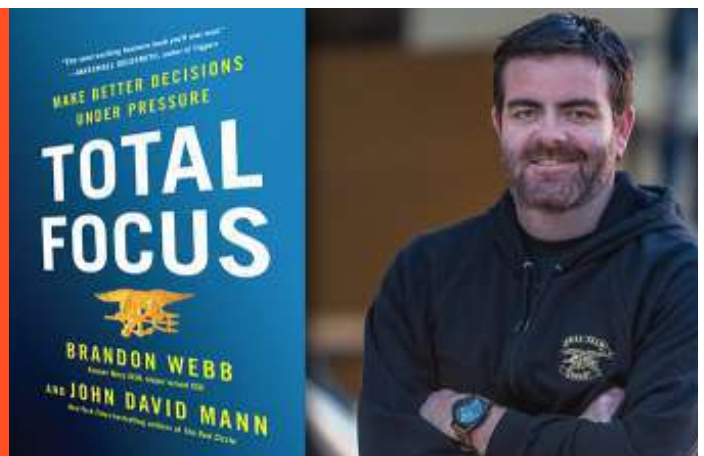
Furthermore, set deadlines and try to stick to them. There is a reason people have deadlines in school and work. For some reason when you have your own business you are more likely to give yourself a break and that is not good.

It is likely that most tasks would not get done in a timely manner if it weren't for deadlines. Set deadlines and work aggressively to adhere to them and watch yourself reap the benefits.

A good mental training trick to use is **punishment conditioning**. According to **Daniel Khaneman's** book **Thinking Fast and Slow**, people hate losing much more than they like winning. It is called Loss Aversion. **One thing that you can do is create a rule for yourself where you give away 10 10 to 20 dollars every day that you do not complete your MIT and your tasks.**
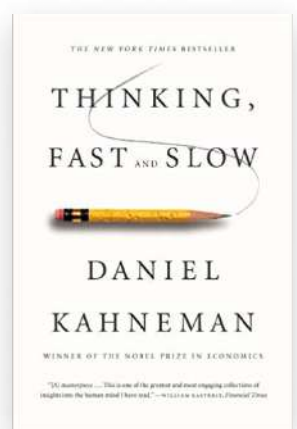
Because you are so averse to losing money, you will be more likely to complete your tasks.

One app worth checking out is called **Stickk (stickk.com)**. With this app people can actually set up campaigns where they give away money when they do not complete certain tasks.

You can also make a pact with a friend, roommate or a spouse where you keep track of each other's key tasks. If you do not do your tasks you give your friend $20. If they don't do theirs they give you $20.

At the end of each month you tally up whether you are positive, negative or flat for the month. Lose money for a few months and it will push you to really step up your game and get tasks done.

Another good app for this is called **SPAR** https://getspar.com/ . It allows people to compete in challenges of doing healthy and beneficial activities. There are pushup challenges, wake up early challenges, running challenges and a lot more.

You can join a challenge by adding money to it's pot. Everytime you miss the activity you are penalized and have to add more money. Those that stick with the challenge to the end split the pot in the end.

For most activities you have to show proof. For example with pushups you have to record it on video and upload it into the app.

Essentially, **SPAR** gamifies productivity and healthy activities and increases your chances of sticking with them by putting some money on the line.

Time Blocking

When you schedule phone calls, appointments and meetings you typically make it a point to attend them. And when you are on business phone calls and meetings you typically do not start distracting yourself with social media or youtube videos of your favorite athlete.

But for some reason, when it's time to work and you don't have to be accountable to anyone but yourself you end up not starting on time and getting distracted.

There are two great tricks to mitigate this.

One is time blocking. Time blocking simply means scheduling productive work time into your Google calendar to make it a priority. You typically know when you will be most productive and focused. Block that time off on your calendar so that you do not schedule meetings or calls during that time. Now turn off your phone and get to work!

To enhance your productivity even further plan to use the Pomodoro System. Essentially the Pomodoro System forces you to work with extreme focus for 25 minute undistracted increments with 5 minute breaks. Each 25 minute period is called a Pomodoro. Here is a great article that discusses how to use the Pomodoro system for maximum productivity.

Needless to say you should not be interrupted when using the Pomodoro system. One thing you can do is block off a period of time to do X amount of pomodoros.

Plan for rest and exercise with hard stops

Always remember about the essential balance of health, mood and productivity.

Basically you can not lose grip on any one of these areas of your life or else things will start to unravel.

In order to keep this balance under control you **MUST NOT** work yourself to oblivium. Plan a hard stop to your work day to allow time for rest so that your mind can wind down,recharge and perform optimally.

Also make sure to allocate time for exercise everyday. This is not just essential for your health and physical body but it is also essential for your mind.
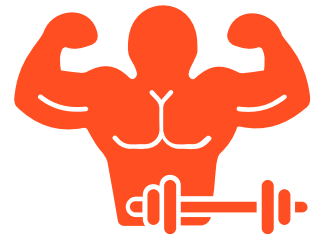
In addition to leaving time each day to relax and exercise give your mind disconnected vacations and breaks every so often.

Have you ever noticed that sometimes your best business ideas come to you when you are on a vacation or resting? This is because your mind is not preoccupied with the daily minutiae and is able to focus on thinking of creative ways to get towards your goals and objectives.

Be Very Frugal with Your Time

The main premise when it comes time to these planning principles is to be extremely frugal with your time.

People generally protect their money, and their possessions and property but they are very frivolous with their time. This is simply wrong because literally everything can be replaced except for time. Time is the only scarce commodity we really have and you must protect it at all costs.

Use your time to move towards your goals. And, as importantly, don't do the things that you don't truly need to do.

Planning Systems

Why Use Systems

Now that you understand the key principles to planning you need to setup the best planning system for optimal success.

In order to do that let's get clear on the main reason for having a planning system in the first place.

The key to having a planning system is to identify and track your most critical tasks and objectives with minimum required effort and stress.

The key is to have a flexible system that can do the following:

✔ Easily add new tasks

✔ Easily recall and organize tasks when needed

✔ Track your tasks and get data on your accomplishments

✔ Allow you to keep your overall goals and objectives in sight.

✔ Cause minimal stress and worry about planning and remembering tasks

Essentially a proper planning system gives you maximum efficiency when planning your days and moving toward your goals.

It gives you stress free productivity!

GTD

There are many planning systems out there but the David Allen Get Things Done (GTD) system is simply the best. If you can master this one you will be blown away by how much easier planning and your overall life will become.

GTD is one of the best and most flexible productivity and planning systems out there.

The main premise of GTD is to capture everything you need to do and get it out of your brain so that you can give it the ability to think and work creatively.
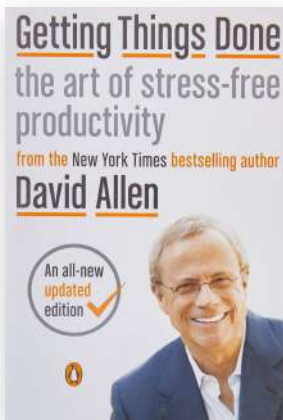
David Allen wrote a book **Getting Things Done** about the system. It is fantastic read for anyone who wants to improve their daily planning and skyrocket their productivity.

Allen argues that by capturing your plans, clarifying them, organizing them in a specific way, and then reflecting and engaging on them, you can become the most efficient version of yourself.

The way to free up your brain is to write down everything you need to do into a catchall known as the inbox. David Allen describes this as basically like a triage at an emergency room.

Here is a video of a great TED Talk by David Allen About GTD

https://www.youtube.com/watch?v=eClN__7Avuk

Here is another great summary if you want to go deep.

https://www.youtube.com/watch?v=gCswMsONkwY

Don't worry you do not have to lug around a notebook with you as there are many apps for the GTD method. A great one is called Nirvana https://nirvanahq.com/

From here you need to organize the tasks by the following.

Next - These are the things that you need to do relatively soon and that you have control over. For example if you need to write an article for your blog and you are the one writing it and posting it it would go into the Next folder.

Waiting - These are the things that you need to get done but you are waiting for someone to provide a component or actually do the task. The Nirvana app actually allows you to add who you are waiting for in the task. This is very helpful when recalibrating your tasks and following up with staff or vendors.

Later - These are your non urgent tasks. Essentially at this time they do not fall into the 20% of the tasks that will get you to accomplish 80% of your goal(s).

Someday - These are ideas or "way later" tasks. They may be needed way down the line but you do not need to act on these tasks now. At the same time you do not want to forget about them. That's why you put them in the "Someday" folder.

Here are some crucial things to consider when planning your days with the GTD system.

1 The premium version of Nirvana actually gives you the ability to add tags to your tasks. You can use this to seperate them between work, home and various side projects.

2 Make it a point to recalibrate your tasks every week. Basically organize everything that is in your inbox into the Next, Waiting, Later and Someday folders.

When recalibrating identify which tasks you can erase and which tasks you can offload to someone else. This is the difference between being busy and actually productive.

3 Always have your key tasks for the day WRITTEN out in front of you and easily accessible. You can star those tasks in Nirvana but it is actually better to have a piece of paper with them written out and on your desk. We will actually show you the best way to do this later in this guide.

4 It will take you about 2-3 weeks to get used to the GTD system. Push through for those 2-3 weeks. When you are used to the GTD method your mind will open up.

Your stress will decrease because you will not be worried about remembering tasks anymore. And you basically will not even know how you survived without GTD. It Is an EXTREMELY POWERFUL AND EFFECTIVE lifehack.

5 When you are working, have a place handy where you can record all future tasks, and ideas. You can do this right in your Nirvana App or you can create a space on your daily task planning sheet specifically for this purpose.

We will provide you with a printable Daily Task Planner PDF which has space for future tasks.

If you get an idea or think of a future task as you are working, use this resource to write it down.

If the task you come up with is very tiny, do it right away. If not, writing it down instead of acting on it immediately will keep you focused.

6 Schedule all meetings and calls in Google calendar. This can sync with your phone, email, and computers for maximum productivity. Use Calendly or Schedule Once to let people set up appointments with you during your available times.

Be very frugal with your call/meeting times. Remember, you can always schedule follow up appointments with people or companies at later times. Do not schedule long appointment times when first meeting with them.

In addition to having your calls and appointments in your calendar you can add them to your daily task sheet.

7 Keep track of the number of big tasks and that you accomplished each day and your task accomplishment percentage. This will gamify the process for you and add additional motivation to accomplish more tasks.

Team Project Management

Chances are you are not working in isolation. If you are an entrepreneur then you have the privilege of managing a team.

Notice we used the word privilege. If done well managing a team can be extremely fun and rewarding. You can really maximize your efforts knowing that you have others working on your project at full capacity.

If done poorly managing a team can be extremely difficult, inefficient and frustrating.

This is not black and white unfortunately. In fact it is a constant struggle to keep everything in line. One day you are excited about how much your team is helping you get towards your goals the next day you feel like you are throwing money away by keeping them on board.

Here is 1 key principle and 1 key tool that can help with this ever present challenge.
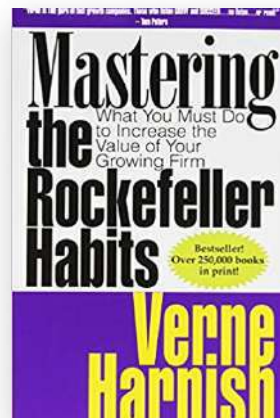
The principle is this. Have a meeting to go over your team's/companies tasks at least once a week. This meeting will be the heartbeat of your company.

This is not a guide on business management so we will keep it brief. But there are two great books on management strategies that you should definitely checkout.
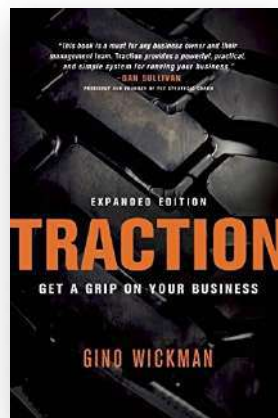
Traction
by Gino Wickman

Rockefeller Habits
by Verne Harnish

Both books are fantastic and both are in agreement about the necessity of a meeting at least once per week. Actually a daily standup meeting is better, if possible.

The second component is the right project management tool. As you know there are many. There is Monday.com, Trello and Asana. At Ultiself we use Asana, asana.com.

With Asana you set up a project. For example your project can be your business.

And then youInside the project you can set up boards. Your boards can be departments of your company like marketing, product development, sales, recruiting ect.

We actually set up our Asana boards with the GTD method in mind. For each department of the company we have an Inbox. That inbox is essentially a catchall for all ideas, or tasks for that department.

Then the tasks are broken down between Next, Waiting later and Someday sections. We organize the Asana every week in our weekly meetings.

Unlike Nirvana, with Asana you need to assign each task to a person and have a due date.

When the task is overdue it lights up red. Having weekly meetings and going over these tasks creates a culture of accountability in your company and team.

Just like with personal tasks make it a point only to focus on the most critical tasks when assigning tasks. You don't want to give staff work just for the sake of it.

Remember tasks that may seem simple may get complicated. It is better to do the critical stuff well rather than half assing a bunch of tasks that you may not even need.

Make it a big point that each staff member is accountable to the whole team and absolutely must get his work done on time. Try to find a way to gamify this system by giving your staff rewards for consistent timely completion of tasks and possibly penalties for non completion.

This is critical with a group. If you get into a culture of consistently not completing your tasks on time it will be terrible for your business because your staff will be ok with not having a sense of urgency. Make sure that you plan your tasks very carefully and don't ever be ok with having with them being overdue.

DEADLINES ARE EFFECTIVE! USE THEM!

Planning Your Actual Day

We covered the principles we explained the premise of the GTD system. Now let's look at how to actually plan your day for maximum productivity.

First let's identify the key things that you need to take into consideration when planning your days.

Item	Time Frequency	Action/Description
Goals and Major Objectives	Yearly/Monthly	Have them written down and visible everyday. This way you can plan and adjust more frequent tasks according to your goals and objectives.
Major Weekly Objectives	Weekly	These are the major tasks that you have to do during the week in order to accomplish your objectives and goals. Write them out and have them visible every week.
Daily Big Tasks	Daily	These are the big tasks that you need to accomplish to complete your weekly objectives. Identify these the night before your work day and add them to your daily task plan. This should include your MIT.
Daily Small Tasks	Daily	These are the small things that you need to do everyday to keep your business/job afloat. Examples can be replying to a certain email, updating a spreadsheet, asking a service provider a question ect. Identify these the night before your workday and add them to your daily task plan.
Meetings/Calls/ Appointments	Daily	This is pretty self explanatory. These are basically your upcoming calls, meetings and appointments. Add these to your online calendar and your daily task plan.

Now it's time for the rubber to meet the road. And actually create your daily task list. This task list should be designed for maximum productivity and should help you accomplish your goals as quickly as possible.

Your daily task manager sheet should consist of the following items.

✔ Big Tasks (Including your MIT)

✔ Small Tasks

✔ Calls and Meetings - Technically these need to go in your calendar but it is a good idea to keep a list available in your physical task manager sheet.

✔ Future Tasks and Ideas - You need to have a space to quickly write down future tasks or ideas as you are working so they don't clutter up your brain.

The sheet is designed in a very simple way that goes in line with how the human eye looks at a screen or a document.

The big tasks are most important. They must go to the top right of the doc as this is the area where the eye looks first. Make sure you star your MIT here.

In the bottom left list your calls, meetings and appointments.

In the bottom right are your small tasks.

Right above that you can have a box where you jot down ideas and future tasks.

Below is an example of what the Template for the Ultiself Daily Task Manager sheet.

If you want a nice printable version simply you can get a printable PDF. Print out a whole bunch of them and use this as the control panel for your workdays.

The sheet is super simple to use and will really help organize your days.

At the end of each day take 10 minutes to recalibrate your Daily Task Manager sheet with your planning apps and calendar like Nirvana, Asana and Google Calendar.

And take 10 minutes to plan your task for the following day. We know this is repetitive but it is so very very important. Make sure that the tasks you set for yourself are truly critical to getting to your objectives and accomplishing your goals.

Don't just plan random tasks. Really take the time to think strategically when planning your days. Your time is limited so make the most of it.

Break Big Tasks Into Subtasks

One of the hardest things to do when working on a new task is actually getting started.

As you start working the feeling of overwhelm will eventually go away. But in the early stages a task may seem extremely daunting.

In many cases you don't know where to begin. And get a bit confused on your steps as you are working on the task.

This can cause procrastination and inhibit your ability to focus.

A great way to deal with this is to break your big task into small sub tasks.

Essentially, plan what are the key steps you need to take to accomplish the overall task.

For example if your task is to write an article the first step may be to create an outline, the next step may be to research certain things, then write the text ect....

For this reason on our Daily Planning Sheet we are leaving a lot of space for the big tasks.

It is ideal for you to break them down into sub tasks.

Keep focused on the next small item and you will get results.

Conclusion

Now that you have read this guide you should be able to supercharge your planning strategy for maximum productivity.

Here are some key takeaways.

- Be frugal with your time. Only focus on things that are critical to get you to your goals. In addition to planning for work make sure that you plan for rest relaxation and physical exercise, they are essential.

- There are many planning systems out there, but nothing compares to the GTD system. Use it! Once comfortable with it you will be blown away by how well it will organize your life while mitigating stress.

- Always keep your Daily Task List visible and use it as a guide to your day.

- Make sure to complete your MIT each day no matter what.

Use these key principles and tips to enhance your current task management system, create a new one or simply use the one we provided in this guide.

You will be very impressed by how much more you will begin to accomplish.

To your success!

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