

CHECKLIST OVERVIEW

The goal of this checklist is to walk you through a weekly planning process and help think of all the tasks you may need to accomplish during a given week.

You'll also benefit from having project- and category-specific checklists or plans in place that you can review during your weekly planning.

FIRST THINGS FIRST

- ✓ What must you focus on this week? What are your most important goals or projects?
- ✓ What are the primary categories of work you have for this week? (The template limits this to 5 categories, which could also be a project. You may have less. I often have 3.)
- ✓ What are your working hours this week? What personal commitments do you need to account for?

FOR EACH CATEGORY/PROJECT

- ✓ What must be done this week?
- ✓ What other valuable work may be able to get done this week to move this project forward?
- ✓ What would you like to get done this week?
- ✓ What could you hand off to someone else?
- ✓ What tasks do you need to follow-up on?
- ✓ What meetings do you have related to this project or category the week after next? What can you do to prepare for them?
- ✓ Is there an opportunity to use any new tasks or concepts this week in my work?
- ✓ Does my checklist or plan for this category or project need to be updated? (If so, add it as a task so it gets done!)
- ✓ Is there work in this category that I expect to come my way next week? (Add placeholders so you allocate time, even if you don't know exactly what the work will be. For example, a project might be in testing and you are expecting questions about the requirements or to deal with requirements issues, but you don't yet know what those will be.)
- ✓ What meetings do you have related to this project or category next week? What can you do to prepare for them?



WEEKLY PLANNING CHECKLIST

FOR EACH TASK

- ✓ Is the task written so that it is specific? How will I know when it's complete?
- ✓ How much time will it take to complete this task?
- ✓ When is this task due?
- ✓ What day(s) will I work on it? Or finish it?
- ✓ What tasks are most important? (Consider marking these in some way. I like to add an asterisk next to the task.)
- ✓ Are any tasks on my list non-critical or optional? (If so, consider marking these in some way. I like to capture them inside parentheses.)

FOR MISCELLANEOUS/PERSONAL ITEMS

- ✓ Do you have any calls or meetings unrelated to a project or category scheduled for next week?
- ✓ Is there a special project or assignment that needs to be moved forward?
- ✓ Are there any personal items I want to move forward on during my work or work break hours next week?
- ✓ Do I have room in my schedule next week to move forward on any of my professional development goals?
- ✓ Do I have any appointments that impact my working hours?

Copyright © 2014 Bridging the Gap – All Rights Reserved.

