Do not attempt to do this at the very end of your business day. Schedule it for an hour or two <u>before</u> your business day ends (or very early before your day starts) to ensure you are able to get it done before you start the business day. Use your Outlook or Google calendar to confirm/update/revise your schedule. If you do it the previous business day, make sure you do a mini start up list firs thing in the business moning.

REVIEWS THESE DAILY, AND ON MONDAYS AND FRIDAYS FOR THE COMING WEEK

1. What am I not going to have finished today that needs to be prioritized for the next business day?

2. What's already on the agenda for tomorrow? What do I need to have prepared for the next business day?

3. What are the top 3-5 things I must get done the next business day to be the most successful?

4. Which Appointments/Follow-Ups/**Reminders** should be Dismissed? Deleted? Rescheduled?

5. Am I double booked at any time tomorrow? What do I need to reschedule/address with meeting organizer?

6. Have I allocated sufficient "Preparation" and "Catch Up" Time on my calendar for the next business day?

7. Have all the Meeting Requests I have sent for the next business day been accepted?

8. Have I accepted all the Meeting Requests sent to me, or "Declined" and replied to the ones I haven't?

9. Have I allocated TRAVEL TIME for future meetings when I will be driving or flying?

10. What else do I need to BLOCK time for the next business day, the rest of this week, and the next week to ensure completion of what needs to be done?

11. Check your iPhone/iPad if you are using the native Calendar app and not Outlook or Google calendar.

GRAB EVERYTHING ELSE - SO YOU MISS NOTHING

1. Review your "Waiting for Answer" folder

2. Consolidate any open items (check your notes/tasks and projects lists) to ONE list. Possible locations you might need to check include, but are not limited to:

• OneNote Notes*	• Outlook Notes
• Paper Notes	• Post-It Notes
• Emails	• Text Messages
• Voice Mails	• Pending/Waiting for Answer folder(s)

*__We strongly OneNote users always insert the calendar details into the corresponding OneNote Section in advance__.

3. Move any time-sensitive/time-specific tasks and/or projects to your calendar

    3a. Move the rest to your "TO-DO/TASK/ACTION LIST" list(s) (see below)

CREATING A TO-DO/TASK/ACTION LIST

1. We recommend Microsoft To-Do/Planner for Microsoft 365 or Tasks and/or ClickUp for Google Workspace.

2. Block time to address your task and project list.

DON'T OVERWHELM YOURSELF; HAVE A SEPARATE "STRATEGIC" LIST AND LIST(S) FOR INDIVIDUAL PROJECTS

Example: "Do you have anything that needs to be done but is not urgent?"

1. If yes, add to your "Strategic"" list and block time for those tasks.

2. A separate list for projects