

Weekly Checklist

Spend 1 - 2 hours per week running through this documents and typing out the responses

Stage 1 - Get all my inputs back to zero

Collect inputs from all different sources

- Pieces of paper
- Notes from meetings/calls
- Emails
- Voicemail messages

Capture (write down/type) your thoughts on each of the below points

- What's been happening this last week?
- What have I been working on?
- What projects are on my mind? Why?
- Conversations I've had this week or need to have in the future with my boss
- Conversations I've had this week or need to have in the future with clients
- Any family events or personal issues to manage

Organise and go through the decision-making process getting any new items on the master actions list. Ensure I'm on zero at

- Email
- Paper notebook
- My in tray

Stage 2 - Organise

Calender

Go through each calendar appointment in the last 2 weeks, is there anything to follow up?

Go through each calendar item in the next 3 weeks, are there any new actions here?

Think further ahead in the diary, are there any initial conversations or advanced travel planning I can sort

Master Actions

Check through master actions list, is there anything that can be crossed off?

Read and ensure I have clarity about each action listed?

Are all the Wrike project plans up to date for any active projects I'm working on?

Waiting for

Check anything that can be removed from the waiting for list?

Quick 1 to 2 minute emails that can chase up any items that are becoming urgent?

Add anything that will take longer than a couple of minutes to chase to my master actions list?

Projects

Go through projects list that are finished or simply no longer need to happen

Any new projects to add?

Do I have any additional projects stored anywhere else (team project plan etc), add them to master project list?

Stage 3 - Think Ahead

Projects

Go through each project in term and make sure I have added new next actions to the master action list. At the very least ensure I have one action on my master actions list?

Think about the strategic level with each of these projects, what more is needed?

Master Actions

Decide on the main activity areas for the next week

Think about what the big priorities will be

What items need to be completed next week for it to be judged a success

Make a reminder note in my calender or mark the high priority tasks

Which items will present a big challenge to my proactive attention, schedule these specifically

Good ideas

Anything here that I need to re-negotiate?

Any new ideas to add?

Wider World

Are there any opportunities in the wider world ?

Stage 4 - Get Ready

Are there any documents I need for the next week, get them printing?

Are there any travel tickets I need?

Are there any conversations I need to have with people to ensure that they are prepared for the things happening next week?

Drop quick emails to confirm meetings or ask for more information in prep for next week

Is there anyone who needs to know more about my schedule for next week?

When are going to be my best periods of proactive attention?

When am I likely to be exhausted, stressed or not at my best

Is there anything I can do now to support those times or minimise hassles?

Stage 5 - Questions

Focus

Is there anything on my master actions list so big or that will take so long that it would be better if broken up into chunks?

Is there anything on my list that's been hanging around for a few weeks? Do I need to redefine the action to give it more clarity?

Ruthlessness

Delete one thing from my master actions list simply because there not mission critical

Delegate one thing from the list to somebody else who could do it just as easily

Resistance

Is there anything here I'm resisting?

What makes it/them challenging?

What is going to give me the momentum I need?

Could I cheat or move the goalposts?

What's the smallest step forward I could take, if there are any do that?

Health & Fitness

Am I eating well?

Am I drinking enough water?

Am I getting the exercise I need? If not where can I fit that into my routine next week?

Did I meditate or find time to completely switch off?

How do I feel emotionally and physically? Are there any problems or issues I need to think about

Relationships

Am I spending enough time with family and friends?

Am I happy when I do this? If not, could I change it

Hobbies

Am I making time for my hobbies?

What's coming up in the next week?

Happiness

Am I happy, at least most of the time?

What would make me happier right now?