

## Lesson 6

# Scheduling Checklist

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When you do a look ahead on your schedule, whether it's for the week or the month it should include a review of all in-progress and upcoming tasks, including anticipated start dates and deadlines. All significant activities and resources should be included as well. A look ahead can be completed either at the end of the current week (Friday afternoon) or first thing at the start of a new week (Monday morning).

Use the following lists as a point of reference to make sure you're keeping all your core tasks in mind while you're scheduling out your week, month, and year ahead.

## 7-DAY LOOK AHEAD

- Review your corporate calendar.
  - Look at all in-progress tasks from the previous week and plan to pick up where you left off.
  - Review all upcoming tasks for the week ahead.
    - Make note of all due dates.
    - Include all significant activities and resources needed.
    - Have any project dates been changed and/or moved up?
    - Schedule any last-minute or urgent tasks that have been added and need to be addressed
  - Note all scheduled appointments, meetings, calls.
    - Make sure you're prepared ahead of time, if necessary.
  - If you have any business travel or vacation planned:
    - Tie up any loose ends at the office (finish up projects; set up out-of-office replies; notify or remind coworkers about your departure)
    - Designate a colleague, who's familiar with your tasks, as your backup to answer any questions that arise in your absence.
  
- Review your personal calendar.
  - Note of any special dates (i.e anniversaries, birthdays, holidays, etc.) or events that you plan to attend or host
    - Make sure any cards or gifts you plan to give have arrived and are wrapped
    - Confirm reservations
    - Schedule time to prepare any meals or appetizers you'll be serving - if hosting guests.
  - Schedule your personal time – workouts, meal planning, personal development, self-improvement, learning new skills, social time, etc.

# increasing overall productivity

## 30-DAY LOOK AHEAD

- Review your corporate calendar.
  - What projects or meetings do you need to lead, contribute to, or attend?
  - What are the hard deadlines?
  - Does anyone else need to review or approve your work before the due date?
  - How much time will you or others need to prepare for and perform the work?
  - Plan everything else that's not urgent around your deadlines.
  
- Review your personal calendar.
  - Are there any events or special dates (i.e anniversaries, birthdays, holidays, etc.) that you need to plan, host or contribute to?
  - Do you need to make reservations?
  - Do you need to shop for gifts or order anything ahead of time?
  - Are there any meals, appetizers, or drinks you need to purchase or prepare ahead of time?