

Planning Notebook

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Chapter 1

Introduction

I don't like long introductions generally, so if this is too long for you, just read "An Important Note" below and get on with life.

1.1 Origins

I created this for one main reason: I have a hard time getting and staying organized, especially with regard to financial matters. Part of this is no doubt due to my background (I did not grow up in an environment where people moved money around to benefit themselves) and undiagnosed ADHD (which is something I'm also looking into).

Also, I had a hard time making this and making it look nice with the tools I had available to me. (I like to do a lot of design things in my spare time and

have spent countless hours questioning whether to go with a 10pt font size or a 10.5pt font size. The struggle is real.) Because I like learning new things, I decided to finally learn how to use \LaTeX . I have no idea what took me so long—the learning curve is not steep and it's remarkably powerful. Because it's basically a text file, I can compile it to a pdf file to share, but I can also share it via Git for those who want to create their own version.

1.2 An Important Note

You don't have to wait until the beginning of a new year to start this. In fact, I suggest that you avoid New Year's Day to make any major changes in your life. There is already so much going on, what with it being the height of the holiday season for most western religions. As well, people *expect* you

to commit to changes. (And take delight in when you fail.)

Rather, start where you are, and make changes as gradually or as quickly as you feel comfortable with. As the cliché goes, there's no time like the present.

1.3 A Minor Note

Like I mentioned above, I've generated this document using \LaTeX . As a result, this document is subject to all the limitations of \LaTeX , and more specifically, my limited (though growing) abilities

with \LaTeX . If you want to correct any markup errors I've made (and I'm sure there are plenty), please contact me.

1.4 Why Do People Have Trouble Keeping Track of Things?

Chapter 2

Goals

Let's talk about goals.

Presumably you want to make a plan because you have some end in mind—something in your life that you want to change, see more of, or see less of. We're going to work on a year-long plan to get you at least partway to those goals.

What

This is the easy part. "What" means what you actually want to achieve. This can be anything from "lose ten pounds" to "save \$2,000 for a down payment on a new car". Whatever you choose, it must be *specific* and *measurable*. In other words, it has to be something you can see. This is why most people who fail to achieve a goal: it's not specific. You can

There are six parts to setting and achieving a goal, and if you studied journalism in high school or college, you'll recognize them. Those six parts are what, who, when, where, why, and how. Let's look at each one in a little bit more detailed.

easily tell if you've gained ten pounds just by getting on a scale. You can easily tell whether you've saved money by looking at your bank balance.

But if your goal is "get more organized" there's no way to measure "organized". The way out of this dilemma is to stop and think about what that's going to look like.

Who

There are actually *two* "who"s here: Who can I rely on to help me achieve this goal, and who will benefit by my achieving this goal. With almost every goal, you're going to be the main beneficiary. But often, there are other people in your life who

will also benefit when you achieve this goal.

The other thing to consider is who you are going to tell about this goal. Yes, some goals may be very private, but making your goals public tends to help you achieve them.

How

The "how" describes the methods you are going to use to achieve this goal. And yes, it is methods, plural. If a goal is worth attaining, it's probably going to require a few different techniques to achieve it. For example, if your goal is to lose weight, you will probably achieve it through a combination of diet and exercise. This will mean that you have to learn to cook healthier food and how to shop for healthier food, as well as learning how to exercise safely.

If your goal is to *stop* an unhealthy habit (such as smoking), then you are going to have to learn what to do in its place. This could also involve multiple techniques to achieve it.

Put a lot of thought into your "how." This part of goal-setting is where a lot of your sub-goals will come from. But a lot of these will also end up as dead ends. You may have thought that a particular technique would work for you, but it doesn't, so you'll need to go with a different plan.

When

When do you want to achieve this goal by? One month, six months, 12 months? Or this a goal that is going to take more than a year? If so, where do you want to be at the end of the first 12 months?

You will also want to build some milestones into your timeline. A lot of people make a goal of exercising every day, and then when they skip a day, they figure that they will just exercise twice as much the next day. But when you put something off like that, it becomes easier and easier to just keep putting it off. The way to avoid this is by building milestones into your timeline.

For example, if your goal is to lose 30 pounds in the next nine months, then you should lose an aver-

age of just over three pounds per month. You should set some milestones so that after three months, you will have lost ten pounds, and after six months, you will have lost 20 pounds. This gives you some intermediate goals to aim for, but also provides some flexibility if you have a bad month.

In this planner, you will have space to list annual (i.e., 12-month) goals, and then space to break these down into smaller goals which you think of as monthly goals. Within the planner pages themselves, you will then have room to break down the monthly goals into goals for each week. This is where your “how” and “when” come together.

Where

Not many people give thought to where they are going to achieve their goals, as it is often not very important. But for some goals, location is everything. If you’re trying to eat healthier, for example,

you may need to start going to a different grocery store, or take a different route home which avoids driving by so many fast food restaurants and their drive-throughs.

Why

This is where your motivation is going to come from. *Why* do you want to achieve this goal? How will

achieving it make your life better?

Chapter 3

Annual Goals

Okay, let's make some goals for the next 365 days. But first, let's talk about SMART goals. "SMART" is an acronym that helps make sure your goals are workable.

S means **specific**. Your goal isn't attainable if you can't describe what it looks like. "Get healthier" is *not* specific, because there are a lot of different aspects to health. "Lose weight" or "eat less junk food" *are* specific, because you're either losing weight or you're not, or you're eating less junk food or not.

M means **measurable**. Goals without numbers are meaningless, because you will never be able to tell where you are. You have to put some numbers on it. "Get healthier" isn't measurable because there's no scientific way to describe what "healthier" means. On the other hand "lose 20 pounds" or "lower my blood pressure by 10 points" are *very* measurable.

Likewise, "eat healthier" isn't measurable. "Eat fast food a maximum of three times a week" is measurable.

A means **achievable**. Your goal has to be something that you can actually accomplish in a reasonable amount of time, based on variable that you have control over. A lot of people short-circuit themselves by choosing goals that are not achievable.

"Write a book" is achievable. "Write a *New York Times* best-selling book" is not, because you have no control over whether a publisher will decide to publish it, and no control over whether the book-reading public will decide to buy it.

R means **relevant**. If you are going to achieve a goal, it has to mean something to you. Trying to achieve personal goals that other people tell you should achieve is not going to mean much to you. Another way to think of "relevant" is "personal." This goal should mean something to you personally. (And yes, you have goals at work, but because they are tied to your paycheck, they are relevant to you.)

T means **time-bound**. As they say, a goal without a deadline is just a wish. You need to have an end date.

It's perfectly fine if a goal takes more than one year to accomplish, by the way. Some goals, such as writing a book or running in a marathon, will definitely take longer than a year, depending on where you are starting.

Chapter 4

Monthly and Weekly Goals

On the next few pages, you will see an annual goal on the left, with room to describe the “what, who, how, when, where,” and “why” and then a page on the right to break this down into monthly

goals.

Keep in mind that a monthly goal may take more or less than a month to achieve. We only use the word “monthly” as a convenience.

Goal #1

The Plan	
What	
Who	
How	
When	
Where	
Why	

Goal #1

Monthly Goals	
#1	
#2	
#3	
#4	
#5	
#6	
#7	
#8	

Goal #2

The Plan	
What	
Who	
How	
When	
Where	
Why	

Goal #2

Monthly Goals	
#1	
#2	
#3	
#4	
#5	
#6	
#7	
#8	

Goal #3

The Plan	
What	
Who	
How	
When	
Where	
Why	

Goal #3

Monthly Goals	
#1	
#2	
#3	
#4	
#5	
#6	
#7	
#8	

Goal #4

The Plan	
What	
Who	
How	
When	
Where	
Why	

Goal #4

Monthly Goals	
#1	
#2	
#3	
#4	
#5	
#6	
#7	
#8	

Chapter 5

Weekly Task List

I find it helpful to keep track of what household chores need to be done. That way, I don't spend an entire day each weekend just cleaning house and catching up on laundry, and I can plan ahead for needed supplies. If you have a busy household, you may find it handy to print out the following page, fill in the chores and assignments, and then lami-

nate it and stick it on the front of your refrigerator. Everyone can then use a whiteboard marker to cross off their chore when it is done. You can then have a celebration on Sunday night when everything is done and you can wipe the entire sheet clean again, ready for the next week.

Weekly Tasks

Day	Task	Assigned To
Mo		
Tu		
We		
Th		
Fr		
Sa		
Su		

Chapter 6

The Year

The rest of this planner consists of 52 weeks of planning pages.

Week 1

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 2

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 3

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 4

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 5

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 6

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 7

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 8

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 9

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 10

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 11

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 12

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 13

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 14

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 15

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 16

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 17

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 18

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 18

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 19

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 19

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 20

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 20

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 21

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 22

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 23

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 23

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 24

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 25

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 26

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 27

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 28

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 29

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 30

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 31

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 31

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 32

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 33

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 34

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 35

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 36

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 37

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 38

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 39

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 40

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 41

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Th			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 42

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 43

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 43

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 44

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 45

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 45

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 46

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 47

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 48

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 49

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 50

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 51

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 52

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

