

Session 4.20 | The Importance of Your Weekly Review

One of the top problems that we've identified in our work with leaders is that they stop reviewing their vision and their plans. And those things that were once identified as most important fade into the noise of life and work.

Your life and your work are not something that you plan once and then put away. They are far too important for that! To have maximum impact, your action plans and the tools that we've looked at together in this Fast Track must be reviewed regularly.

In this Module, Review, I am going to show you how you can Measure, Track, and Celebrate progress to consistently maximize your influence and your impact. We are going to look at 3 regular reviews that need to be a part of your calendar.

In this session we are going to look at The Importance of The Weekly Review.

Take just a moment right now to download the Worksheet for this session and follow along.

About 15 years ago, I began a weekly practice of looking back on the week I had just completed and at the same time looking ahead to the next week. When I first started this practice I primarily spent the time reviewing my Simple Personal Plan and my Simple Vision.

Over the years, my weekly review has come to include more and more items which help me:

1. Retain margin in my schedule. When I have more margin, I'm better prepared to interact in my relationships, both at home and at work.
2. Maintain healthy relationships and connections. To connect better in relationships with people.
3. Be more fulfilled in my work, and
4. Be more productive and more effective.

I noticed that I had some margin on Sunday during the early morning hours when the family was still sleeping. So I scheduled my weekly review of my personal plan and simple vision during that time.

And I want to show you 4 ways the weekly review has helped me to find greater fulfillment and greater effectiveness in my life and work...

1. Reconnect with what was truly important in my life and work.

As I said, my Simple Personal Plan and my Simple Vision outline the things that I have identified as having the highest-value in my life and work.

We all know that life happens. We can have the best laid plans, but the chaos of life and work seem to find a way into our daily and weekly schedules. And we end up off track.

The urgent replaces the important. If I've strayed off track or my progress has slowed, my weekly review allows me to refocus and reset. It helps me to reconnect with the highest-payoff disciplines that I've identified in my life, in my work, and in my leadership. So it helps me reconnect with the important.

2. Review progress.

I'm naturally more attuned to the areas that need improvement. And so it's easy for me to be blind to the progress that I'm making. So it's really important for me and my personality to set time aside to review where I've come from – and how far I've come.

All of us can benefit from celebrating progress more often because it provides energy and creates momentum to get us to the next step, to get us to the next level. So number two, review progress.

3. Look ahead.

It's critical for me to reconnect with where I'm headed both short-term and long-term. So I take a look at the next week or two in my calendar to see what's coming up. Then reviewing my Simple One-Page Business Plan helps me keep up with both short-term projects and reviewing my Simple Vision helps me to keep the 5, or 10-year, or 20-year goals in view.

4. Make course corrections or to make updates on a regular basis.

When I first completed these Time and Focus tools (including the Simple Personal Plan, the Simple Vision, the Simple One-Page Business Plan, *My Best Week*, the tools that we've looked at in this Fast Track) they weren't perfect. In fact, they've always been pretty dynamic, they've change overtime. I found that there were a lot of things that just didn't work in the early days. They were works in progress.

They are tools that should be viewed as drafts or held in an open hand, and tools which will regularly review and revise as needed. And often during my weekly review, I'll make minor notes and updates on a weekly basis.

In addition to my Weekly Review, I also schedule my Quarterly Review to make significant improvements. And we'll look more at that in another session.

I also schedule an Annual Review each year during the week between Christmas and New Year's. It's a discipline that I learned from Michael Hyatt.

We'll look at the Quarterly and Annual Review over the next couple of sessions.

But in this session, let's take a look at the Weekly Review Template that I put together. Using this tool will save you a ton of time and energy of having to create one on your own.

When I first started using my Weekly Review tool, I pasted the following template into the notes section of a recurring weekly appointment on my calendar. This provided a quick reference for me when I sat down to review my week. Today, after all these years, this same appointment is still on my calendar.

So here is my Weekly Review Template that I review every single week...

1. Review my Simple Personal Plan. This document is just a few pages long. 5 or 6 pages, there's a lot of white space. So it doesn't take me a ton of time to do it. In fact, I've read through my simple personal plan literally hundreds and hundreds of times. And so I know what's there. I know the areas where I'm working currently, and I know the areas where I want to evaluate and see how I'm doing from week to week. So number one, I review my simple personal plan.
2. Review my Simple Vision. This is the vision document that I've written out that includes where I'm headed in my work and with my career. Again, we walk you through both of these transformational tools in great detail in the simple leadership masterclass. And so I encourage you to take a look at that and see if it makes sense for you.
3. Gather all the loose papers and I process them. I empty everything out of my computer bag, I take everything that's on my desk, everything that's in my To-Do folder that I have collected throughout the week, any unprocessed notes that I have and I go through them one by one and I make a decision what to do with it. I decide if it is something that requires me to take action.

If not, I have three options:

1. Trash it - If I don't need it anymore, I'm not interested anymore.
2. Add it as a task in our project management software or Asana for me or a team member
3. File it for future reference and typically I'll do this in our Project Management app, or on my calendar, or in our online files in a way I can go back and get it later.

If the item does require me to take action, I can:

1. Do it if it takes less than five minutes or add it to my task list to do later..
2. Defer it by actually scheduling time on my calendar to deal with it;

3. Delegate it to someone else for action or enter it into our Project Management app to remind me or our Business Manager to follow-up with me on the task.

So number three, I gather all the loose papers together, and then I process them, I decide is it something that requires me to take action or is it something that someone else needs to do.

4. Process my meeting notes. I read back through my notes, looking for action items that I agreed to do. Is there anything that I've neglected to do, anything that I haven't finished that I agreed to do and action item that I made for myself that I still need to deliver on.
5. Review the calendar for the previous week. I look over the previous week's Calendar to see if there is anything that I've missed. For example, I don't usually take notes in lunch meetings, and even some other ad hoc meetings but I may want to follow-up with a thank you note or a gift. So usually I'll think through those things. Is that something that I need to do or I would like to do at this time for someone that I spent time with this past week?
6. Review my upcoming calendar. So I looked back on the week before, now I'm going to look forward. This is one of the most important parts of my Weekly Review. Because I note any upcoming meetings to consider the preparation that I'll need to do prior to the meeting. This keeps me ahead of the curve and my responsibilities on track.
7. Review my action and task lists. I also try to do this daily, but during the Weekly Review I ask myself this question, "What do I really need to accomplish over the next week?" If it's an important task, I add it to my calendar and I schedule it.
8. Review the tasks that I have delegated to others. This is a list of items that I have delegated to other people that are important enough for me to track. If something is overdue, or I need a progress report, I'll send an email to nudge the person that's responsible or add it to my notes for the next one-on-one meeting. Then I'll note that task in our Project Management app that I sent a reminder to them.
9. Review my tasks in our Project Management app. When an action consists of many sub-actions, it qualifies as a project. And our Business Manager helps us coordinate these projects. Here I review the major projects and I consider the next action that's required to keep the ball rolling from my perspective. These are items that may not require immediate action but they're scheduled in the future. If I'm ready to move on these, I change the due date and I update it in the appropriate project list.
10. Process all of my email and I try to get my inbox to zero. In a previous session, we showed you how to process email and how to do it more effectively and efficiently. So I won't spend more time with that here, but the goal is to get the inbox to zero if it's not already.

11. Review next week's content development. A significant portion of my role is creating content or editing content that we're creating. Whether it's article, or book projects, or training and workshop content, podcast or interview planning, whatever it is, I look ahead to see what's coming up so I can make sure that I'm prepared to deliver on my responsibilities.
12. Look at the weekend schedule and next week's schedule to get an idea of what's coming up. That way I'm prepared for it more effectively.
13. Plan family time for the upcoming week. In our family, I'm the one that thinks ahead and thinks about what we should be doing or could be doing with our entertainment time or time together as a family.

So whether it's a date with my wife, or time with the kids, or special events, I look ahead to see what's coming up so that I can plan for the coming week.

14. Turn off my computer and phone. My phone stays on "Do Not Disturb" most of the time anyway. And on weekends I rarely check my phone or computer.

This template will help get you started as a framework for your Weekly Review.

When we first look at it, it can seem like a lot of stuff. But honestly now, I move through these items pretty quickly and in less than an hour, I can get through all of these things and I feel ready to look ahead to the week that's coming up. When it comes to creating a weekly review process for you, you don't have to get it perfect, you really just need to take the next step.

After 15 years, I'm still learning, I'm still adjusting this process to work for me - because my life and work evolves through the seasons of life. Yet, I've seen dramatic improvements in my life, in my work, and in my leadership – particularly in areas that are top priority for me.

If you haven't already, take a moment right now to download the Worksheet for this session and complete the action steps.

Next Session

In the next session we're going to look at the Quarterly Review and look at how it differs from the Weekly Review.

I'll see you in the next session.