



Session 2.16 | Create an Annual Plan

We've been considering the question, what do you do when there's not enough time for leadership development? In the last session, we looked at Fast Action Step #1 - Take Control of Your Schedule. This session helped you with the mindset or the mind-shift for managing your time and your focus.

In this session, I am going to show you the next fast action step - How to Create an Annual Plan to make time for what matters most.

Again, if we consider the question:

What do you do when there's not enough time for leadership development?

Fast Action Step #1 - Take Control of Your Schedule.

Fast Action Step #2 - Create an Annual Plan.

Now, there's this tool that you can download on this page, and I want to encourage you to go ahead and download that tool so you can follow along while we're walking you through the tool step-by-step.

This tool was designed to help you to get the most important people and events in place first so that you can effectively plan the rest of your schedule around them.

If you don't make time for the important stuff first, it will be crowded out by the less important every single time, guaranteed!

If you want to find more fulfillment in your life and your work, then do the important stuff first. Stephen Covey, years ago, illustrated this concept brilliantly in his best-selling book, First Things First. He talked about getting the big rocks, put in place first, and allowing everything else to filter in around it.

I've found this to be true in my own life for me over and over, and I found it to be true in hundreds of leaders as we've worked with them to better control their schedule and to invest more into the people who are most important in their life, in their work, and their leadership. My role demands that I spend significant amounts of my time on strategic planning and significant projects. Yet the small, urgent day-to-day challenges and problem-solving seem to crowd into my days.

Before I realize it, another day is gone. Then another week, another month, and another year! Many times I've arrived at the end of my year many times only to realize that I have a

substantial amount of unused vacation time or personal time. And that it's been months since I spoke with or spent time with some of my closest friends. The people who I value most – my family and friends – for years, took a back seat to my work.

That all changed. I want to share with you how that changed for me.

In fact, I've written a lot over the years about the value of the simple personal plan and guide that we've developed and how it's helped me to achieve better results in nearly every area of my life. This was one of those areas.

I realized that to have the greatest impact in my role, in my work, I needed to get more specific and more proactive in planning the important things, the big rocks first, the First things first before my days and weeks, and calendar and schedule became crowded with the priorities of other people.

I created an Annual Plan to use during my annual review each year between Christmas and New Year. I get away, I get away during this time and I review My Annual Plan to help me think through the next year and even beyond that to make sure that I'm spending the time with the people and on the tasks and projects, and strategic things that I wanted to spend my time on. My Annual Plan was originally based on a simple Microsoft Excel template that was originally developed by Michael Hyatt years ago, and I have continued to update it over the years.

You'll want to download that template again on this page. To follow along, I'm going to show you how to complete it.

There are several tabs on the template down at the bottom. On two of the tabs, I have included two years of my own Annual Plan as an example along with a blank tab, which you can copy and edit.

Now, let me show you what I plan for...

You will notice that I only plan major items. This isn't my calendar. It doesn't replace my calendar, my schedule, my appointment book. This is only for major items. Again, think the big rocks, the big functions, the things that are most important, and the people who are most important in your life, your work, and your leadership.

The more specific items and more discretionary items and projects – they're included in other tools that we're going to look at later. Here are the items that I included in my Annual Plan:

- Company Holidays
- Industry Events & Conferences
- Family Vacations & Day Events-Time Events
- Board Meetings

- Business Review Meetings (Monthly, Quarterly & Annual)
- Travel
- Church Meetings/Events
- Time with friends

In fact, in just a couple of weeks I'm taking two of my kids and we're going to spend several days in Florida with some friends of ours, and so we planned those things that will be a multiday, even a full-day, or part of the day things. We want to get planned into there as well.

If you have an assistant, developing an Annual Plan will help immensely with managing your calendar and appointment schedule. This one exercise was transformational for me and my assistant when we first did it. If you don't have an assistant, we'll talk later about how to manage these things either with an assistant how without an assistant, or how you can even get an assistant without spending much money. We'll talk about that at a later time.

Now, while your list may differ from these items that I have, these items ensure that I block out these high priority things before they fall prey to the priorities of somebody else. If you don't proactively plan your life, we've said it before; someone else will gladly do it for you.

Creating margin and developing margin for yourself, for your leadership development starts with...

Fast Action Step #1 - Taking Control of Your Schedule - the mindset, the mind shift - for managing your time and focus

Fast Action Step #2 - Creating Your Annual Plan to help you get your most important people and events in place first, so that you can effectively plan the rest of your schedule.

If you haven't already, take a moment right now to download the Annual plan guide or template and the worksheet that goes along with this session, and complete the action steps for this session.

Next Session

The last few sessions we've been looking at, what to do when there's not enough time for leadership development. We're walking through tools and steps that you can take to make progress in this area. In the next session I am going to show you Fast Action Step #3 - How to Use the Best Week Tool to simplify your regular schedule.

Remember, you don't have to get it perfect, you just need to take the next step.

So, I'll see you in the next session.