

Using a Calendar and Task List to Effectively Manage Your Time

Objective

To use a calendar and task list system to effectively manage your time.

You Should Know

Calendars and task lists are the foundation of organizing your time effectively. A planner or calendar is a necessary tool for you to track your short-term and long-term schedule, as well as your responsibilities and tasks. Your task list will contain information you need to remember not tied to specific dates, and it replaces easily-misplaced slips of paper. Your calendar includes appointments, meetings, and events that have specific dates and times. Developing the habit of using a planner and task list will help you:

- Replace all loose pieces of paper, especially appointment cards.
- Manage your time and remember your responsibilities.
- Stay organized.
- Log phone messages and calls you to return.
- Review your task list every day and revise accordingly.

You might choose a comprehensive planner that includes a calendar and space for lists. Some planners include a section for frequently-used phone numbers, email addresses, and other important pieces of information. There are different types of planners:

- **Print/paper-and-pencil.** You might review brands like Franklin Planner, Day-Timer, or Planner Pad.
- **Tablet or smartphone app.** Check your app store for apps such as Things, Any.do, TeuxDeux, or Todoist.
- **Computer time management software.** There are several options, including Focus Keeper, Rescue Time, or MyLifeOrganized.

Each has its advantages, and you will need to decide which type works best for you. If you like having your schedule visible at all times, a paper planner might be best. You can review those options in an office supply store or online. If you are worried you will misplace a paper planner, use a phone app, which can send reminders via notifications, texts, or email. Apps can also sync with online calendars at home and work.

Because there are so many options, the “best” system for you is the planner, app, or software you will actually use. Remember, learning any new skill takes practice and time. You might not be used to writing down appointments or checking a planner or app. Be aware of self-sabotaging thoughts, such as, “I’ve never been organized – why bother?” Just focus on your reason for wanting to manage your time more effectively, and imagine the sense of accomplishment you will feel for taking this positive step.

You might find it useful to break the process of using a planner and task management list into manageable steps. Follow the steps for a week or so until using your planner and task list becomes a habit. You might also ask a family member or friend to be your “planner coach.” That person can prompt you to practice the steps and encourage you to complete and stick with your system.

1. **Enter your information in the planner.** Include contact information for medical professionals and others you might need to contact.
2. **Get in the habit of carrying your planner (or phone, to access the app) with you.** If you carry a bag, store your planner or phone there. Keep it on your desk when you are at work and take it with you to meetings in case you need to take notes.
3. **Keep the planner/phone in one spot when you are not carrying it.** That way, you will know exactly where it is when you need it. You might keep it wherever you keep your keys, for example.
4. **Conduct a daily planning session.** Schedule time every day to do your daily planning (put it on your calendar until it becomes a habit!). Spend 30-60 minutes planning the next day’s activities, errands, required tasks, and appointments. If you have open slots of time, you might transfer tasks from your master task list for completion.
5. **Refer to the calendar and task list regularly.** Check your planner at least three times a day: once in the morning, once around midday, and once in the evening.
6. **Use the planner as your calendar for everything.** Include medical appointments, exercise classes, meetings, family members’ appointments, and expense due dates. If you have recurring events, put them in your electronic calendar once and choose how often they should appear.
7. **Use your planner as a “brain dump.”** Note ideas or important thoughts, rather than relying on your memory to retain them. You can brain dump during your scheduled daily planning time.

If the above step-by-step approach is hard for you, consider breaking it down into even smaller steps.

What to Do

Check off the following steps when complete.

_____ Choose a planner that works for you. Spend some time reviewing your options. What did you choose? _____

_____ Once you have your system set up, add your appointments, meetings, and any scheduled tasks for the next week (*and beyond that if you have repeating events or scheduled appointments*).

_____ Enter important information, such as phone numbers, addresses, email addresses.

_____ Create a “master” task list. Remember, these are items that do not have a date/time attached. Some examples: paint the shed or organize bedroom closet. You might also include weekly grocery lists or project materials you need to purchase.

_____ If you have a paper planner or you are using a phone app, choose a spot where you will store your planner and/or phone when you are not carrying them with you. What is the dedicated spot you have chosen? _____

_____ (*optional*) Who can be your “planner coach?” _____

Did you ask this person for help? Y N

Describe how this person can support you, including how frequently you will check in.

For two weeks, use the chart on the following page and track your planner and task list use. Include the date, and each day schedule 30 minutes for daily planning. Note if you did it or not. Mark off if you checked your planner three times each day. Finally, discuss how using your planner and task list went each day.

Date	Daily planning complete? Y / N	Check planner and task list at least three times today?	Notes
		<input type="checkbox"/> Morning <input type="checkbox"/> Midday <input type="checkbox"/> Evening	
		<input type="checkbox"/> Morning <input type="checkbox"/> Midday <input type="checkbox"/> Evening	
		<input type="checkbox"/> Morning <input type="checkbox"/> Midday <input type="checkbox"/> Evening	
		<input type="checkbox"/> Morning <input type="checkbox"/> Midday <input type="checkbox"/> Evening	
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		<input type="checkbox"/> Morning <input type="checkbox"/> Midday <input type="checkbox"/> Evening	

Reflection on This Exercise

Describe your experience using the planning system you chose. Did you experience any challenges? Explain.

If you have experienced a lifetime of organizational and planning difficulties, discuss the emotions or challenges you faced establishing your calendar and task list system.

If you asked for help from a “planner coach,” did you find it helpful to receive feedback and support from this person? Why or why not?

What did you learn about yourself during this exercise?

How helpful was this exercise? _____
(1 = not very helpful, 5 = moderately helpful, 10 = extremely helpful)

What else can you do to make progress in this area?
