



Getting Organised Digital Guide



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About this publication

This report summarises the research activities carried out by the consortium partners to define a competency map based on an updated analysis of needs and in-depth benchmark research due to the progress of COVID-19 (sixth wave) and its continuous consequences in 45+ adults, within the Erasmus+ project PRIORITY45: Promoting employment of 45+ adults through a disruptive training approach (Cooperation partnerships in adult education, project number: 2022-1-PT01-KA220- ADU-000087183).

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Introduction

Getting organised becomes increasingly important as we are getting older. Learning effective time allocation, goal setting, and prioritization techniques can help you to make the most of your time, improve productivity, reduce stress, and achieve a better work-life balance.

By developing organizational skills, you can enhance your efficiency and productivity; on one hand, improving your chances of using better your time in your current job or in a potential one, but in the other hand, making better use of your time in your personal life.

Effective time management, and good planification are qualities that organisations value in their staff. Furthermore, being organized contributes to a professional image, demonstrating reliability and professionalism.



This module is focused on **“Getting Organised”** divided in **2 units** with complementary material to one another. After these 2 units of Module, you are going to be able to navigate in changing circumstances and handle multiple tasks effectively.

First unit “Time Management” is an essential part, emphasizing the development of people’s time management skills. Its objective is to give you the fundamental abilities you need to maximize your time. This unit explores the foundations of time management, common problems and obstacles, the relationship between productivity and time management, and time-saving techniques and technology.

Second unit is “Planning” and here, our focus will be on unravelling the foundational principles of planning, delving into the intricacies of SMART methodology for objective-setting, and unveiling the art of breaking down goals into manageable steps, also, it will be important for you to have some notions about SWOT analysis. You will explore the meticulous mapping of tasks essential for achieving objectives, emphasizing the most efficient utilization of available resources. Also, work-life flow is important to integrate professional and personal spheres in a dynamic balance with good planification.

Module Structure

Units	Learning outcomes	Content
Time Management	<p><i>On successful completion of this module, participants shall be able to:</i></p> <ul style="list-style-type: none"> Understand the importance of time management in personal and professional contexts. Identify common time management challenges and obstacles. Understand the concept of productivity and its relationship to time management. Gain knowledge of tools, technologies, and resources that can assist in time management. 	<p>Time management</p> <p>Time management challenges</p> <p>Prioritisation and focus</p> <p>Tools, technologies, and resources</p>
Planning	<p><i>On successful completion of this module participants shall be able to:</i></p> <ul style="list-style-type: none"> Understand planning and organisation at work, differentiating between effectiveness and efficiency. Know the SMART methodology. Know how to use DAFO analysis. Organise a working day independently. Know strategies to balance professional and personal life. 	<p>Introduction to planning</p> <p>Setting smart goals</p> <p>Creating actionable plans / Strategies / Adjusting plans</p> <p>Work-life flow</p>



U n i t 0 1

Time Management

Learning Outcomes

On successful completion of this module, participants shall be able to:



Understand the importance of time management in personal and professional contexts.

Understand the concept of productivity and its relationship to time management.

Identify the importance of time management in personal and professional contexts.

Gain knowledge of tools, technologies, and resources that can assist in time management.

Content

Time management

Time management challenges

Prioritisation and focus

Tools, technologies, and resources

Introduction

Time is a precious asset, and how you use it can have a big impact on both your personal and professional life. Time management involves efficiently allocating time to tasks and goals while preserving a healthy balance in life. The goal of this unit, “Time Management,” is to give you the fundamental abilities you need to maximize your time.

The significance of time management in a period characterised by global competition, resilience, and digitalisation cannot be overstated. Effective time management is essential for professionals looking to reskill or upskill themselves. It enables you to increase productivity, lower stress levels, and preserve a positive work-life balance.

This unit explores the foundations of time management, common problems and obstacles, the relationship between productivity and time management, and time-saving techniques and technology.

Time management

Time management is a multifaceted skill that involves several key elements. One of the core principles is prioritisation. It involves identifying and focusing on tasks and activities that have the most significant impact on your goals. By **ranking tasks in order of importance**, you can ensure you are dedicating your time to the most valuable activities.



Now, let's break down the key components of effective time management:

— Effective Planning

Create a structured schedule with clear objectives, to-do lists, and calendars. Example: Plan your week ahead, allocating specific time slots for different tasks, ensuring nothing is overlooked.

— Organisation

Maintain an organised workspace for better focus and efficiency. Example: Clear your desk of unnecessary items to minimize distractions and find what you need easily.

— Delegation

Recognise when to delegate tasks, freeing up time for critical responsibilities. Example: Delegate routine administrative tasks to a team member, allowing you to focus on strategic aspects of your work.

— Time Blocking

Assign specific time blocks for focused, uninterrupted work. Example: Dedicate 9 AM to 11 AM solely for project work, turning off notifications to minimize interruptions.

— Goal Setting

Set clear, achievable goals and break them down into manageable steps. Example: Break down a large project into smaller tasks, making it easier to track progress and stay motivated.

— Empowerment

Time management empowers you to make consistent progress toward your goals. Example: By allocating time wisely, you can steadily work towards personal and professional ambitions.

— Work-Life Balance

A structured approach minimizes last-minute rushes, reducing stress and promoting a better work-life balance. Example: Plan personal activities alongside work commitments for a well-rounded life.

— Increased Productivity

Focusing on high-impact tasks and efficient time use increases productivity. Example: Completing important tasks efficiently leaves time for additional projects or personal development.



Time management challenges



While effective time management is a valuable skill, it is not without its challenges, especially for individuals aged 45 and above seeking professional re/upskilling. In this section, we will explore the specific hurdles you may encounter and provide insights into overcoming these challenges.

The first challenge can be balancing responsibilities. For 45+ adults, managing multiple responsibilities can be a significant challenge. Many in this demographic juggle family obligations, work commitments, and their pursuit of new skills and knowledge. Balancing these responsibilities requires careful planning and prioritisation. To address this challenge, it is essential to set clear boundaries and define the times when you are focusing on work, family, and personal development.

Another option is to communicate your priorities. Make sure your family and workplace understand your commitment to self-improvement and the importance of balancing these responsibilities. You can also delegate household or work tasks when it makes sense, freeing up time for upskilling efforts. Adapting to technology is also a matter of great importance when it comes to time management. As the modern workplace becomes increasingly digital, individuals who are less familiar with technology may face a learning curve when adapting to digital tools and applications that can aid time management.

To adapt to technology effectively you should always seek assistance when it is needed. Do not hesitate to ask for help from more tech-savvy colleagues, friends, or family members.

Also, invest in learning. Take the time to learn about and practice using digital tools. There are many online resources and courses available for technology newcomers. A strong advice is to choose user-friendly applications and tools that align with your needs and skill level. User-friendly tools among all these that are available nowadays

You can learn more about the Benefits of improving ICT skills / Digital literacy in Module 5 of PRIORITY45 course.

Also, invest in learning. Take the time to learn about and practice using digital tools. There are many online resources and courses available for technology newcomers. A strong advice is to choose user-friendly applications and tools that align with your needs and skill level. User-friendly tools among all these that are available nowadays.

Procrastination can be another challenge to be combated. Maintaining motivation and overcoming procrastination can be a hurdle for anyone, regardless of age. For 45+ adults, finding the drive to re/upskill and adapt to new technologies can be especially challenging.

There are a few strategies that could prove helpful in situations like these. For example, you should set small, achievable goals. Break larger goals into smaller, manageable steps to provide a sense of accomplishment. You can also reach out to a support network. Join groups or communities of like-minded individuals pursuing similar goals. Encouragement and accountability can boost motivation.

You can learn more about procrastination and how to avoid it in Module 5 of **PRIORITY45 course.**

Overcoming time management challenges is crucial. By understanding these unique obstacles and implementing tailored strategies, individuals can navigate their journey effectively. Balancing responsibilities, adapting to technology, maintaining motivation, and combatting ageism are all part of the journey toward better time management and a successful re/upskilling experience. Mastering these challenges is a significant step in achieving a productive and fulfilling work-life flow.



Prioritisation and focus

Prioritisation, focus, and setting SMART goals serve as essential pillars, enabling you to make the most of your time and achieve your objectives. This section reveals the significance of prioritizing tasks, maintaining unwavering concentration, and setting **SMART goals** for effective time management.

You can learn more about **SMART goals** in **Planning unit of Module 3** of the **PRIORITY45 course**.

Prioritisation is essential for managing time well, helping you to focus on your goals like a guiding compass. Especially when dealing with learning new skills, mastering prioritisation can make the difference between moving forward and getting stuck. Your initial step towards effective prioritisation involves identifying tasks that directly contribute to your objectives. This often entails acquiring new skills, participating in training programs, and pursuing opportunities aligned with your career aspirations. Moreover, prioritisation necessitates ranking tasks in order of their significance. It prompts you to reflect on which activities will exert the most profound impact on your career and personal development. By dedicating time and effort to high-impact tasks, you ensure that your endeavours are channelled towards activities of utmost value.

Concentration, in tandem with prioritisation, plays an equally vital role in effective use of time. Concentrating on tasks empowers you to work with greater efficiency, accomplish assignments in less time, and avoid squandering precious moments on distractions.

In the digital era, distractions abound, making the task of maintaining focus increasingly challenging. Strategies to mitigate these distractions encompass the deactivation of notifications, the creation of a dedicated and organised workspace, and the establishment of specific time blocks reserved for focused and undistracted work.

Time blocking, a technique employed to safeguard your concentration, revolves around the allocation of specific time intervals for designated tasks or activities. By designating these uninterrupted blocks of time, you can ensure your focused and unbroken engagement in your responsibilities. when you recommence your work.

Furthermore, the inclusion of mindfulness practices in your routine can facilitate the preservation of presence and focus. Reducing stress and anxiety through these mindfulness techniques enhances your capacity to concentrate on the tasks at hand. However, it is important to recognise the necessity of short, planned breaks within your workflow. These intervals provide a respite, revitalizing you and invigorating your ability to maintain concentration when you recommence your work.

Tools, technologies and resources

In the realm of time management, tools, technologies, and resources act as indispensable aids, augmenting an individual's ability to make the most of their time and efforts. In this section, we will explore the significance of harnessing these assets, particularly within the context of professional re/upskilling for 45+ adults.

Time management tools boost productivity, serving as force multipliers for individuals seeking to optimise their schedules. Some essential categories of tools are Digital Calendars and Schedulers, To-Do List Apps, Time Tracking Software, Project Management Platforms and Note-Taking Apps.

Let's check some options you have available online!

23 Time Management Tools
To Help Your Small Business Succeed

Photo: Management tools <https://www.zoomshift.com/blog/time-management-tools/>

*The link can be found in the additional resources

Digital Calendars

Modern digital calendars, such as **Google Calendar** or **Microsoft Outlook** can help you to organise schedules efficiently. Users can set reminders, create events, and synchronize their calendars across various devices, ensuring they never miss an appointment or task.

To-do's Lists

To-do list applications, like **Todoist** or **Teamwork**, enable to catalogue tasks, set priorities, and track their progress. These apps are invaluable for organising daily or weekly activities and ensuring nothing important is overlooked.

Todoist is a popular to-do list application that allows you to catalogue tasks, set priorities, and track progress. It helps you organise daily or weekly activities, ensuring nothing important is overlooked. The app is user-friendly and offers features like project organisation, due dates, and collaboration.

Teamwork is another robust to-do list application with collaboration features. It enables you to organise tasks, set priorities, and track progress. You can collaborate on projects, share updates, and ensure you are on the same page regarding tasks and deadlines.



Time-tracking tools

Time tracking tools like **Toggl** or **Harvest** can help you monitor how you allocate your time.

Toggl is a tool that helps you monitor how you allocate your time. You can track time spent on different tasks and projects. It provides valuable insights into your productivity, allowing you to identify areas where time might be better spent. Toggl is suitable for both individual and team use.

Harvest is a tool designed to help you manage your time effectively. It allows you to track billable hours, project expenses, and client invoices. Harvest provides detailed reports, making it easier for you to analyse productivity and optimise time allocation for different tasks.

These applications can provide valuable insights into productivity and identify areas where time might be better spent.

Project management tools

Project management software such as **Trello** or **Asana** is ideal for handling larger tasks or projects. Users can create boards, set deadlines, and collaborate with others, ensuring efficient project execution. Learners can access a wealth of tutorials and guides to master the functionalities of advanced tools like these.

Furthermore, Excel defines itself as a flexible yet approachable choice. Excel is known for its flexibility, but it is also quite user-friendly for beginners. It can be used to create simple timetables, organise to-do lists, and track simple projects.

Notes and capture ideas

Apps like **Evernote** or **OneNote** facilitate the capture of ideas, important information, and tasks. They allow users to create digital notebooks for efficient organisation and easy retrieval.

Evernote is an app that helps you capture ideas, important information, and tasks. With Evernote, you can create digital notebooks for efficient organisation and easy retrieval. You can take notes, clip web articles, and even save images. The app is designed to be your digital workspace, making it easy for you to keep all your information in one place and access it whenever you need it.

OneNote is for capturing ideas and information. It allows you to create digital notebooks where you can organise your thoughts, tasks, and important details. With OneNote, you can type, draw, or even record audio notes. The app syncs across devices, ensuring you have access to your notes whether you are using your computer, tablet, or phone.

In the digital age, the integration of technology is a fundamental aspect of efficient time management. Below you can find some technological resources tailored to assist in time management.

Online Learning Platforms

A wide range of courses and resources are available for skill development and upskilling on platforms such as **Coursera**, **edX**, **Athena e-learning Platform**, and **LinkedIn Learning**. These platforms support efficient time management in addition to giving people the ability to improve their skills.

By offering accessibility and flexibility, they let people study at their own pace and easily integrate skill development into their schedules. By combining time management and online learning, people may effectively set aside time for upskilling without interfering with their current obligations, encouraging a well-rounded and fruitful approach to self-improvement.



Productivity Apps

Productivity applications, such as **Microsoft Office 365** or **Google Workspace**, streamline work-related tasks. These apps include tools for word processing, spreadsheet management, and communication, enhancing productivity and collaboration.

Time Management Apps

Dedicated time management applications, like **RescueTime** or **Focus@Will**, offer insights into digital habits and aid in maintaining focus.

RescueTime is a dedicated time management application that helps you gain insights into your digital habits and aids in maintaining focus. With RescueTime, you can receive analytics that help you understand how you spend your time online. The app tracks your activities on various applications and websites, providing you with valuable data to make informed decisions about your digital usage.

Focus@Will is another dedicated time management app designed to enhance your focus. It offers insights into your digital habits and helps you stay concentrated on your tasks. The app provides background music scientifically optimized to improve concentration and productivity. By analysing your usage patterns, Focus@Will aims to create a work environment conducive to maintaining focus and avoiding distractions.

E-Books and Digital Libraries

E-books and digital libraries, accessible through platforms like **Kindle**, **Apple Books**, or **public libraries**, provide a vast array of reading materials. These resources support continuous learning and personal development.

Incorporating tools, technologies, and resources into one's time management strategy is fundamental for professional re/upskilling. These assets are necessary for productivity, enabling individuals to stay organised, focused, and efficient. The integration of these tools, technologies, and resources empowers individuals to master time management, ensuring that they can make the most of their time while successfully face the challenges of re/upskilling in an ever-evolving job market.



Case study

Time Management in Career Transition

Sarah, a 47-year-old marketing professional, found herself at a career crossroads. She had been working in traditional marketing roles for over 20 years, but the industry was rapidly evolving with the digital age. Realising the need to update her skills, Sarah decided for transition into the world of digital marketing. Sarah faced several unique challenges as she embarked on this career transition. She was a working mother with two teenage children and a supportive, yet demanding, spouse. Juggling family responsibilities, her current job, and her career transition was a complex task. While she was tech-savvy to a certain extent, the digital marketing landscape was far more complex and dynamic than what she had been accustomed to. The vast array of digital marketing tools, strategies, and platforms was sometimes overwhelming, leading to procrastination and wavering motivation.

Sarah began by setting SMART goals (Specific, Measurable, Achievable, Relevant, and Time-bound). She identified her immediate need to become proficient in specific digital marketing tools, such as Google Ads and social media advertising. She recognised that mastering these skills was crucial for her transition.

To prioritise her time, she decided to allocate focused periods each day to learn about these tools and practice her new skills. She identified her most productive hours, which were early in the morning, and dedicated this time to her learning. Sarah also recognised the importance of finding a balance between short-term and long-term objectives, acknowledging that some skills would take time to develop.

To maintain focus, Sarah created a dedicated home office space free from distractions. She used digital calendars to plan her study sessions and work tasks. To-do list apps helped her keep track of assignments and learning goals. Additionally, she used time tracking software to monitor the time she spent on different tasks.

By applying time management principles tailored to her unique circumstances, Sarah effectively navigated her career transition. She communicated openly with her family, seeking their understanding and support in managing household responsibilities. Gradually, she became proficient with digital marketing tools and strategies.

The situation of Sarah emphasizes how important time management techniques are for handling career changes. Using SMART objectives, prioritisation, and internet resources, people may effectively manage their time and learn new skills even in the face of demanding work and personal obligations.

Summary

The Time Management unit stresses the important skill of using time wisely, especially when it comes to dealing with career changes, learning new skills, and managing various aspects of life. Within this unit, individuals learn more about prioritisation. This skill allows to discern the tasks that truly matter, balancing immediate objectives with long-term goals. By dedicating time to what holds the most significance, they foster a sense of direction and accomplishment.

Focus is another essential element explored. The unit provides practical strategies to create an environment free from distractions. Through techniques like time blocking and mindfulness, individuals gain the ability to work efficiently, enhancing productivity.

Additionally, the unit highlights the power of digital tools and technology. From digital calendars and to-do lists to e-books and online learning platforms, these resources facilitate continuous growth and skill development. Throughout the unit, challenges unique to this age group, including balancing responsibilities, adapting to technology, sustaining motivation, and overcoming age-related obstacles in the job market, are acknowledged, and addressed. Ultimately, time management becomes the guiding force leading individuals toward their goals while maintaining a fulfilling work-life balance.

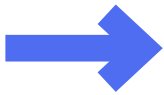


Unit 02

Planning

Learning Outcomes

On successful completion of this module, participants shall be able to:



Understand planning and organisation at work, differentiating between effectiveness and efficiency.

Know the SMART methodology

Know how to use DAFO analysis.

Know strategies to balance professional and personal life.

Organise a working day independently

Content

Introduction to planning

Setting smart goals


Work-life flow

Creating actionable plans / Strategies / Adjusting plans

Introduction

Have you ever felt like you had no idea where to turn with so much to do? Organising our personal and professional lives is not always easy but developing planning skills could be very useful.

This unit focuses on understanding the complexities of planning, helping you understand its fundamental principles and equipping you with the tools to face the constantly evolving challenges of a fast-paced world. At its core, planning is more than a mere organisational tool; it is a structured and purposeful approach to growth. Planning could empower you to strategically allocate your time, resources, and energy to achieve tasks with precision and effectiveness. *Does it not sound good?*




In this unit, our focus will be on unravelling the foundational principles of planning, delving into the intricacies of SMART methodology for objective-setting, and unveiling the art of breaking down goals into manageable steps, also, it will be important for you to have some notions about SWOT analysis. You will explore the meticulous mapping of tasks essential for achieving objectives, emphasizing the most efficient utilization of available resources. Also, work-life flow is important to integrate professional and personal spheres in a dynamic balance with good planification.

Let's get started!!!

Introduction to planning

In our current society, it is really typical to juggle with a great number of responsibilities at the same time, from personal working aspirations to familiar obligations and friendship or leisure relationships, and even community involvement. These obligations demand a skill set that transcends the traditional work-centric approach, which means that you have other things that only your job position and they are as important as work. Today, planning is a crucial life skill for adults to deal with the complexities of real-world scenarios.

Planning is preparing a sequence of action steps to achieve some specific goal. By meticulously charting out the steps needed to reach personal milestones, you can bring a sense of order and purpose to your endeavour fixing goals and planning how to reach them. It is very important.



Planning is present in many spheres, as it can be done with different aspects like for example:

→ **Our available time**

(to balance our work-life, family and leisure activities)

→ **Money**

(from designing a budget that aligns with personal goals to organise **strategies for long-term financial security**)

→ **Health**

(like wellness routines, and fitness schedules).**strategies for long-term financial security**)

→ **In parenting and household management.**

From creating family schedules that accommodate diverse activities, to planning for educational milestones and vacations, the skill of planning is indispensable in a family environment.



It is important to say that the ability to set goals that are not only aspirational but also realistic and attainable is crucial. In the context of adult life, where we have diverse aspirations in different spheres, learning to craft objectives that align with one's current circumstances while allowing room for a balanced life is a foundational aspect of planning. In the following point, we will focus on this.

But planning is more than these because this skill involves knowing how to prioritise, to discern what truly matters among the huge number of competing demands. By allocating time and resources carefully, you can focus on what is most important for you at any given moment, because time, could be the most precious and finite resource in our life.

While planning provides structure and order, the unpredictability of real life necessitates flexibility and adaptability. How many times has it happened to you that a plan you had for the weekend has been ruined? Even the best plans can face unexpected changes, and being able to adjust strategies in response is a fundamental part of good planning.

**This information is
complementary to
the information of the
→ Module Resilience**

In the planning process there is a personal evolution because, through the process of setting goals, making choices, and assessing outcomes, individuals gain insights into their values, priorities, and areas for development; they are ready to overcome procrastination, one of the main hurdles for achieving goals; and ready for making decisions.

With planning you are cultivating your proactive mindset. This proactive stance may increase your sense of empowerment, as you realize your capacity to shape your own destiny and decide with intentionality.

Procrastination

The act of delaying or postponing tasks, often despite knowing that this delay may lead to negative consequences. It involves putting off activities that need to be accomplished, opting for more immediate and often less important tasks or simply avoiding the task altogether. Procrastination can manifest in different forms, such as habitual avoidance, indecision, or finding excuses to delay actions.

Proactivity

Taking initiative and being actively engaged in one's life and work. It involves anticipating, planning, and taking steps to create positive outcomes, rather than reacting passively to events or circumstances. Proactive individuals are forward-thinking, goal-oriented, and often exhibit a sense of responsibility for their actions and the outcomes they seek.

Planning is most effective when it integrates both effectiveness and efficiency because each contributes essential elements but there are different concepts although many people confuse them.

Effectiveness

Effectiveness centres on achieving the right goals, directing planning efforts towards objectives that align with overarching priorities. It emphasises the quality and impact of outcomes, fostering a long-term orientation that considers enduring contributions to personal growth and well-being. Effective planning requires strategic decision-making about what to pursue, and it necessitates adaptability to changing circumstances. For example: planning a wedding in an effectiveness way will have a significant impact on how to manage and control the budget, the creation of a detailed timeline and implementing contingency measures to address unforeseen circumstances.

Efficiency

On the other hand, efficiency concentrates on achieving goals with minimal resource waste, emphasising the optimisation of time, energy, and resources. It focuses on the process of goal attainment, aiming for short-term gains through streamlined and consistent execution. Efficient planning involves strategic decision-making about how to pursue goals, with a focus on resource savings. For example, on planning a wedding, creating a spreadsheet to add every expense to identify potential overspent and the possibility of removing things that are not necessary for the big event.



Setting smart goals

As already mentioned, planning is the process of thinking about the activities required to achieve a desired goal. To do it, you must plan a sequence of action steps to achieve some specific goal but before that, you need to define your goals or objectives.

Goals provide direction, purpose, and a roadmap for success. Goal setting involves the development of an action plan designed to motivate and guide a person or group toward a goal. However, not all goals are created equal. For that, it is important to use SMART methodology to fix goals, which is a strategic approach that transforms aspirations into tangible, achievable milestones.

SMART, an acronym for Specific, Measurable, Achievable, Relevant, and Time-bound, serves as a guiding framework in planning, ensuring that goals are not just lofty ideals but actionable and realistic targets.



You can set SMART goals in planning:

1

S of Specific

Clarity of Purpose: Start by defining the goal with clarity. Instead of a vague objective, articulate precisely what you want to achieve. Specific goals provide a clear target, leaving no room for ambiguity.

Example: Rather than setting a broad goal like “Improve fitness,” or “I want to exercise more”, specify it as “Run 5 kilometres three times a week for the next three months.”

2

M of Measurable

Quantifiable Metrics: Ensure that your goal is measurable, allowing for tangible evidence of progress. Measurability applies to both the end result and the milestones along the way to attaining a goal. Measurable goals answer the question: “How will I track my progress and know when I have achieved success?”

Example: Instead of saying “Read more books,” make it measurable by setting a goal like “Read one book per month for the next six months.”

3

A of Achievable/ Attainable

Realistic: While aspirations should challenge you, they should also be achievable. Assess your current circumstances and resources to ensure that the goal is realistic within the given constraints. If you set goals that are unbelievable even to yourself, it is very unlikely you will achieve them.

Example: If you currently run 2 kilometres comfortably, an achievable goal might be to increase it to 3 kilometres rather than jumping to 10 kilometres immediately. Or learn to count in French to 10 in 2 weeks, and not become a fluent speaker in French after 2 months.

4

R of Relevant

Alignment with Values: Alignment with Values: Ensure that your goal is relevant to your overall objectives and values. A relevant goal contributes meaningfully to your larger vision, preventing the pursuit of distractions.

Example: If your overarching aim is career development, a relevant goal might be “Complete a relevant certification course within the next six months.” Or if you have to buy something important in one month, “try to save 150 € each month.”

5

T of Time-bound

Clear Deadline: Give your goal a timeframe, providing a sense of urgency and structure. This time-bound element creates accountability and prevents goals from lingering indefinitely.

Example: Instead of saying “Learn a new language,” set a time-bound goal like “Achieve basic conversational proficiency in Spanish in twelve months by practising daily.”



It is really good to use this methodology for several reasons:

— Enhanced Focus

SMART goals provide a clear focus, helping you to direct your efforts and resources toward specific objectives. This clarity reduces the risk of distractions and ensures a more streamlined planning process.

— Measurable Progress

The measurable aspect of SMART goals enables to track your progress objectively. This not only boosts motivation but also allows for adjustments in the planning process based on real-time feedback.

— Increased Accountability

Time-bound goals instil a sense of urgency and accountability. Having a deadline may encourage you to prioritise tasks, maintain momentum, and take consistent actions toward goal attainment.

— Realistic Planning

SMART goals promote a realistic assessment of what can be achieved within a given timeframe. This prevents setting overly ambitious objectives that might lead to burnout or frustration.

— Alignment with Values

The relevance criterion ensures that goals align with personal values and larger objectives. This alignment enhances the meaningfulness of goals, contributing to a sense of purpose in the planning process.

Creating actionable plans / Strategies / Adjusting plans

Setting SMART goals is just the start. The next crucial step is turning these goals into actionable plans. These plans guide our actions and help us move closer to achieving our objectives. We have to explore the steps involved in creating actionable plans, strategies to make them effective, and how to adjust plans along the way.

STEP 1

Breaking Down Goals into Tasks

Break each SMART goal into smaller, doable tasks or steps. These tasks are like building blocks that, when completed, lead to goal accomplishment.

- Breaking down goals helps turn complex aspirations into actionable steps.
- This process makes it easier to tackle each task systematically, leading to the overall achievement of the larger goal.



- This method serves as a roadmap toward achieving larger goals. Instead of feeling overwhelmed by the enormity of a broad aspiration, breaking it down into smaller tasks makes the journey more feasible. Each task becomes a specific action point, contributing to the overall progress.
- Breaking down goals facilitates better planning and organisation, ensuring that efforts are directed purposefully toward specific, achievable steps.
- This approach fosters a sense of accomplishment and motivation. Completing smaller tasks provides a sense of progress and achievement, boosting confidence and encouraging continued efforts.
- Allows better tracking and monitoring of progress, making it easier to stay on course and adapt plans if needed.



Example

If your objective is to “Improve Work-Life Balance”, that we have turned into “Implement a daily schedule that includes designated work hours, family time, and personal activities to achieve a healthier balance and reduce stress”, you can try breaking down the goal into tasks in the following way:

Task 1 **Assess Current Schedule and Prioritise**

You can start reviewing current daily routines and identify areas that need adjustment; for that it is needed to assess work commitments, family responsibilities, and personal activities to determine their current allocation of time. What do you do every day, how do you spend your time?

Task 2 **Establish Work Hours**

After defining specific work hours, it is time to set start and end times for work, allocating breaks, and creating a dedicated workspace to increase productivity during work hours.

Task 3 **Allocate Family Time**

It is going to designate specific time slots for quality family interactions. This involves planning family activities, meals, or discussions during designated time slots, ensuring uninterrupted quality time with family members. In this case, friends are included too.

Task 4 **Schedule Personal Activities**

Here you can incorporate personal activities for relaxation and self-care, allocating time for hobbies, exercise, meditation, or other activities that contribute to personal well-being and stress reduction. **It is important to include tasks that you enjoy.**

Task 5 **Create a Structured Daily Plan**

After doing the previous tasks, you can create a visual schedule or planner, detailing time blocks for each activity, ensuring a balance between work, family, and personal commitments.

Task 6 **Evaluate and Adjust Schedule Regularly**

Last activity could be used to regularly assess how well the schedule is working, making necessary adjustments to optimise the balance between work, family, and personal time.

**Exercise**

Take your previous specific, measurable, achievable, relevant, time-bound goal and break it down into tasks.

STEP 2**Setting Priorities and Deadlines**

Prioritise tasks based on their importance and urgency. Assign deadlines to tasks to maintain focus and track progress effectively. Prioritisation will help you focusing on critical tasks, while deadlines provide a sense of urgency and direction in achieving those tasks.

To prioritise effectively, start by understanding the significance of each task in relation to the overarching goal. Tasks can be categorised based on their impact, urgency, dependencies, or alignment with the goal's objectives. High-priority tasks are those directly contributing to the goal's success or carrying significant consequences if delayed. Medium-priority tasks are important but not as time-sensitive, while low-priority tasks are less urgent or can be deferred without major impact.

Assigning deadlines to tasks creates a sense of accountability and prompts action. Deadlines help structure efforts, preventing tasks from dragging on indefinitely. It is crucial to set realistic and achievable deadlines that align with the task's complexity and the available resources. Short-term deadlines keep momentum going, while long-term deadlines ensure progress without overwhelming oneself.



Following the previous EXAMPLE:

Task 1 **Assess Current Schedule and Prioritise**

Priority: **High**

Deadline: Complete within the next three days to identify immediate adjustments needed.

Task 2 **Establish Work Hours**

Priority: **Medium**

Deadline: Define specific work hours by the end of the week to ensure work-life boundaries.

Task 3 **Allocate Family Time**

Priority: **Medium**

Deadline: Designate family time slots within the next two weeks to foster family connections.

Task 4 **Schedule Personal Activities**

Priority: **Medium**

Deadline: Allocate time for personal activities within the next ten days for self-care and stress reduction.

Task 5 **Create a Structured Daily Plan**

Priority: **High**

Deadline: Develop the structured schedule within the next month to start implementing the routine.

Task 6 Evaluate and Adjust Schedule RegularlyPriority: **Ongoing**

Deadline: Conduct weekly reviews starting after the first two weeks to ensure the schedule remains effective.

**Exercise**

Now it is your turn, use your goal again after breaking it down into tasks and set priorities and deadlines.

STEP 3**Identifying Resources and Support**

These involve recognising the tools, materials, assistance, or guidance necessary to effectively execute tasks toward achieving a specific goal. It is a crucial phase in the planning process as it ensures that you have the necessary means and assistance to accomplish your objectives efficiently.

You have to determine the resources needed to accomplish tasks—time, money, tools, or knowledge. The Need for identifying resources involves assessing what is needed for each task or goal and acquiring those resources through various means.

Support refers to the assistance, guidance, or cooperation from others that can aid in task completion. This might involve seeking advice from experts, collaborating with peers or mentors, or gaining the support of family members or colleagues.



On the previous EXAMPLE

Task 1 Assess Current Schedule and Prioritise

Resources Needed: Time-tracking apps or spreadsheets for assessing current routines, possibly guidance on time management techniques.

Support: Online tutorials, productivity books, or mentors for time management strategies.

Task 2 Establish Work Hours

Resources Needed: Tools for setting work boundaries, potentially a separate workspace or time-management apps. You can even use a diary with the days divided in hours.

Support: Guidance from a manager or colleagues for setting and planning work hours or setting clear boundaries.

Task 3 Allocate Family Time

Resources Needed: Family calendar on the kitchen or scheduling apps for organising family activities. You can even use a diary with the days divided in hours.

Support: Family members' cooperation to fill family calendar and understanding for designated family time slots.

Task 4 Schedule Personal Activities

Resources Needed: Activity planning apps, exercise equipment, or relaxation aids for personal activities. You can even use a diary with the days divided in hours.

Support: Support from experts in leisure or relaxing activities.

Task 5 Create a Structured Daily Plan

Resources Needed: Planner or scheduling tools for creating a visual representation of the daily routine. Calendar or dairy.

Support: Possibly a mentor or life coach for advice on structuring the daily plan effectively.

Task 6 Create a Structured Daily Plan

Resources Needed: Agenda to evaluate your schedule.

Support: Support groups or communities focused on work-life balance for advice on regular evaluation and adaptation of schedules.

**Exercise**

Now it is again your turn; use your goal after setting priorities and deadlines and follow the steps of identifying resources and support like in the example.

STEP 4

Identifying Resources and Support

These are the practical steps taken to execute the previous defined tasks and accomplish outlined objectives within an actionable plan. Develop strategies for each task to execute each one efficiently. Create step-by-step plans detailing how each task will be completed.

To strategize actions effectively, you need to outline the necessary steps required for each task. This involves breaking down tasks into smaller, manageable components, determining the sequence of actions, and defining the resources needed to execute them.

After that, implementation is the execution stage where you can put your action strategies into practice. Implementation requires commitment, discipline, and adaptability to face unforeseen challenges or changes in circumstances.



Following the previous EXAMPLE:

Task 1 **Assess Current Schedule and Prioritise**

Action Strategy: Research time-tracking apps or use spreadsheets for assessing current routines, and develop those personalised spreadsheets tailored to your preferences for tracking daily routines. Conduct self-assessments or surveys to evaluate how time is currently spent throughout the day.

Implementation: Allocate a specific time on X day (e.g., two hours) to analyse daily activities and prioritise tasks.

Task 2 **Establish Work Hours**

Action Strategy: Define physical boundaries (above all if you are doing remote work) for work by creating a dedicated workspace that signals the start and end of work hours; explore flexible work arrangements with employers, such as flexible start or end times. Set start and end times for work hours including rituals like starting with a specific task or ending with a reflection period.

Implementation: Create a dedicated workspace, communicate work hours to colleagues/family, and establish a daily routine for work-related tasks.

Task 3 **Allocate Family Time**

Action Strategy: Schedule a family meeting to discuss upcoming events, plan activities and allocate specific family time slots. Create a Shared Family Calendar with color-coded entries for each family member to clearly identify allocated family time. Include a specific time slot each day or week for activities without digital distractions. On the calendar you can add specific time slots for family interactions or activities.

Implementation: Discuss and agree upon family time slots with your family in a family meeting, plan activities, and prioritise these time blocks in the schedule and add them to the family calendar.

Task 4 **Schedule Personal Activities**

Action Strategy: List down preferred activities. Carry out the Evaluation of time requirements for each activity to ensure adequate allocation within the daily schedule. Rank personal activities based on their importance. Select specific hours of the day for doing the most important activities.

Implementation: Determine those specific personal activities and assign time slots on the calendar or daily.

Task 5 **Create a Structured Daily Plan**

Action Strategy: Identify essential elements developed on the previous tasks to be included in the daily plan (e.g., work hours, family time, personal activities). Choose suitable planning tools like digital calendars, planners, daily, or time-management apps to include the 3 categories and finally develop a visual representation of the daily schedule.

Implementation: Use scheduling tools or a planner daily to design a detailed schedule incorporating work, family, and personal activities, ensuring a balanced routine.

Task 5 **Evaluate and Adjust Schedule Regularly**

Action Strategy: Implement regular reviews to assess the effectiveness of the schedule.

Implementation: Set aside dedicated time weekly to review the schedule, note any adjustments needed, and adapt the routine based on progress and evolving needs.



Exercise

Now it is again your turn, use your goal after identifying resources and support and think about action strategy. Also, if you can implement it, it would be great.

STEP 5

Make a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) of your plan

It is important to do a **SWOT analysis** to examine the different issues that could impact the successful implementation of your plan.



With this image could be understood easily, but consider that it is the English version and you have to translate it into your language.

To conduct a SWOT analysis for actionable plans, start by analysing internal strengths and weaknesses. **Strengths** are internal positive attributes—what the plan does exceptionally well. These could include expertise, available resources, or innovative ideas that contribute to the plan's success. Conversely, **weaknesses** entail internal aspects that may hinder the plan, such as lack of resources, skills, or potential inefficiencies.

Moving to external factors, **opportunities** are external elements that the plan can exploit or leverage to its advantage. These could be emerging trends, market shifts, or technological advancements. On the other hand, **threats** refer to external factors that could potentially disrupt or pose challenges to the plan's success. These might involve regulatory changes, or economic downturns.

By identifying these elements, you can make informed decisions, allocate resources effectively, and develop strategies to maximize the plan's chances of success.



We keep working with the previous EXAMPLE:

Task 1 **Assess Current Schedule and Prioritise**

- Strengths: Use of time-tracking apps, spreadsheets or self-assessments to understand current routines.
-
- Weaknesses: Relying solely on those resources might overlook subjective aspects impacting time management.
-
- Opportunities: Exploring diverse assessment tools for a comprehensive understanding.
-
- Threats: Overreliance on this assessment might overlook nuances affecting actual time consumption.

Task 2 **Establish Work Hours**

- Strengths: Clear delineation of work boundaries aids in establishing a structured routine.
-
- Weaknesses: Rigidity in fixed work hours may hinder adaptability to changing work demands.
-
- Opportunities: Exploring flexible work arrangements to accommodate unexpected work needs.
-
- Threats: Potential external interruptions might challenge the adherence to predefined work hours.

Task 3 **Allocate Family Time**

- Strengths: Designated family time slots foster family bonding and quality interactions.
-
- Weaknesses: Overcommitment to scheduled family time might induce stress or conflict.
-
- Opportunities: Exploring new ways to optimise family time for increased effectiveness.
-
- Threats: External disruptions may impede planned family time, affecting its quality.

Task 4 **Schedule Personal Activities**

Strengths: Allocating time for personal activities promotes stress reduction.

Weaknesses: Overcommitment to personal activities might disrupt the work-family balance.

Opportunities: Exploring diverse personal activities for better stress management.

Threats: Conflicting schedules might compromise the actual execution of personal activities.

Task 5 **Create a Structured Daily Plan**

Strengths: Visual representation enhances clarity and organisation in the daily routine.

Weaknesses: Over-structuring might hinder adaptability to changing circumstances.

Opportunities: Exploring adaptable scheduling methods for flexibility without compromising structure.

Threats: External disruptions might challenge adherence to the structured plan.

Task 6 **Evaluate and Adjust Schedule Regularly**

Strengths: Regular evaluation aids in adaptability and fine-tuning of the schedule.

Weaknesses: Lack of consistent evaluation might lead to stagnation in schedule adjustments.

Opportunities: Implementing regular feedback loops for continuous improvement.

Threats: Inconsistencies in evaluating might hinder the effectiveness of schedule adjustments.



Exercise

In this exercise, use your goal and make a SWOT analysis in your plan as we have done in the example.

STEP 6

Regular Review and Adjustments

SWOT analysis help you to take decisions and improve your actionable plan, but, moreover, you must review progress regularly and make adjustments when needed. You must adapt plans based on changing circumstances or new insights.



Work-life flow

Previous example could help us understand in this point that adult life often involves a delicate dance between professional commitments and personal pursuits. The ability to plan effectively is instrumental in achieving a balanced work-life flow. Whether it is setting aside time for family dinners, an important meeting, personal hobbies, or self-care rituals, planning empowers to strike a balance that resonates with your unique priorities.



Work-life flow goes beyond professional and personal spheres. It involves integrating work commitments with personal pursuits, creating a holistic approach that recognises the interdependence of these domains. Work-life flow is not about rigidly compartmentalizing different aspects of life but about finding a rhythm where each complements the other. They are not totally different things, sometimes you are going with your work colleagues to a leisure activity, or you need to take your children to work.

Moreover, the traditional nine-to-five paradigm is evolving, with many adults exploring flexible work arrangements, remote work, or entrepreneurship with their own business. Planning, in the context of work-life flow, adapts to these changing dynamics. It involves crafting schedules that align with personal energy peaks, using technology for remote collaboration, and optimising work environments for enhanced productivity and well-being.

It is important to establish that correct work-life flow for different reasons:

Enhanced Well-Being

It promotes mental and emotional well-being by reducing stress and fostering a sense of balance. When individuals feel in control of their time and activities, they experience reduced burnout and improved overall satisfaction.

Increased Productivity

It enables individuals to focus better, leading to increased productivity and efficiency in both work and personal contexts. This increased concentration helps accomplish tasks more effectively. You are going to be focused on the activity at that moment, not thinking in the other spheres of your life.

Improved Relationships

It allows individuals to dedicate quality time to relationships, nurturing stronger connections with family and friends. This contributes significantly to a fulfilling personal life.

Better Health

It promotes better health as it allows time for self-care, exercise, and relaxation, reducing the risk of health issues associated with chronic stress.

For that, planning has an important role in the work-life flow because it can help in:

- **Setting Priorities:** planning helps identify priorities in work, family and personal life. By delineating crucial tasks and allocating time accordingly, individuals can balance their responsibilities more effectively.
- **Time Management:** Planning enables the efficient allocation of time between work-related duties, family time and personal activities. Creating schedules or routines ensures that time is used optimally, reducing the feeling of being overwhelmed by either aspect.
- **Flexibility and Adaptability:** A well-thought-out plan allows for flexibility. It helps individuals adapt to changing circumstances without derailing the overall flow. Adjustments to the plan ensure that unexpected events can be managed without causing significant disruption.
- **Boundaries and Integration:** Planning assists in establishing boundaries between work, family and personal life, yet also facilitates their integration. It helps to set aside time for each aspect and allows for a smooth transition between the two.

For planning your work-flow, you could come back to the EXAMPLE from the previous point following the **6 steps to make an actionable plan**:

- STEP 1** Break Down Goals into Tasks make an actionable plan
- STEP 2** Set Priorities and Deadlines
- STEP 3** Identify Resources and Support
- STEP 4** Action Strategies and Implementation
- STEP 5** Make a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) of your plan
- STEP 6** Regular Review and Adjustments

And considering the **6 tasks** of the example in each one of those steps:

- STEP 1** **Assess Current Schedule and Prioritize**
- STEP 2** **Establish Work Hours**
- STEP 3** **Allocate Family Time**
- STEP 4** **Schedule Personal Activities**
- STEP 5** **Create a Structured Daily Plan**
- STEP 6** **Evaluate and Adjust Schedule Regularly**



Exercise

Try to make actionable plans for your work-life flow following the 6 tasks in each one of the 6 steps like we have done in the example of the previous point. Consider to give enough time for work, family and personal activities.

Summary

Planning is a structured, purposeful strategy acting as a compass guiding individuals towards their goals. By bringing clarity, optimising resources, and fostering adaptability, planning empowers effective and efficient goal achievement, shaping a path to success.

In this unit, we have understood the essence of planning across various life spheres, from work duties, family dynamics and personal hobbies, highlighting its role in fostering balance and thriving environments. We have focused on SMART methodology, an acronym for Specific, Measurable, Achievable, Relevant, and Time-bound goals, a strategic approach to transforming aspirations into realistic, tangible milestones. Now, you know how to do it.

Setting SMART goals is just the start. The next crucial step is turning these goals into actionable plans, and we have analysed it in 6 steps with an example related to improving the work-life balance where it is very important to use planning skills to achieve a harmonious work-life flow with an enhance of well-being, increase the productivity, improve the relationships and better health. Now, you know how to make actionable plans which could be used in the different facets of your life.

Glossary

Main concepts
of the Units

Unit 01

Time Management

Delegation

The process of assigning responsibility and authority to someone else to complete a task, while maintaining accountability for the outcome.

Work-Life Balance

The equilibrium between professional responsibilities and personal life, where both areas are given attention, and neither is neglected.

Unit 02

Planning

Action Strategies

Are the detailed plans or approaches devised to achieve specific goals or objectives. These strategies outline the sequence of steps, tasks, or actions required to move from the current state to the desired outcome.

Boundary

The limit of what someone considers to be acceptable behaviour.

Deadlines

Are specific points in time by which certain tasks, projects, or objectives are expected to be completed.

Effectiveness

Refers to the degree to which something achieves its intended goals or produces the desired outcomes. It's a measure of how well a process, action, or strategy accomplishes its intended purpose and delivers the expected results.

Efficiency

Refers to the ability to achieve desired outcomes with minimal waste of resources, including time, money, and effort.

Flexibility

The ability to adapt to changes, challenges, and new situations without excessive stress, including willingness to change plans or methods.

Planning

Is the process of setting goals, determining actions to achieve those goals, and outlining the steps required to reach them within a specified timeframe.

Priorities

Refer to the key areas or objectives that are identified as most important or urgent to address. This help guide decision-making and resource allocation.

Proactivity

Taking action and making changes before they are needed, rather than reacting to events after they happen.

Procrastination

Habit of unnecessarily delaying a task

Productivity

Refers to the efficiency and effectiveness with which tasks, projects, or activities are completed within a given timeframe. It involves maximizing output while minimizing resources, such as time, effort, or costs.

Resources

Refer to the various assets, materials, personnel, or capabilities available to support and execute plans, projects, or objectives.

SMART

Acronym for Specific, Measurable, Achievable, Relevant, and Time-bound.

SMART Methodology

Is a framework for setting and achieving goals effectively. By applying individuals can create clear, actionable, and achievable objectives that increase the likelihood of success and drive continuous improvement.

Time management

Is the process of effectively organizing, prioritizing, and allocating time to tasks, activities, and responsibilities to maximize productivity and achieve goals.

Work-life flow

Refers to the dynamic balance and integration of professional responsibilities and personal activities to create a harmonious and fulfilling lifestyle. It involves seamlessly transitioning between work-related tasks and personal commitments while maintaining a sense of well-being and satisfaction.



Time Management

- 23 Time Management Tools for Your Small Business
- How to Master Time Management – ADHD Skills Part 1
- How to Multiply Your Time
- 15 Tips to Manage Your Time Better
- 7 Essential Time Management Skills

Planning

- Achieve More by Setting Smart Goals
- Personal Goal Setting
- SMART Goals
- How to Write SMART Goals in 5 Steps
- SWOT Analysis
- Work-Life Balance
- 5 Tips for Work-Life Flow



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PRIORITY 45



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