

# Individual Work Planning Guide



## Supervisor Workbook

# Individual Work Planning Guide

**Work planning** is a discipline staff at all levels of the organization need to understand for productivity planning. There are 13 videos in this **Individual Work Planning** series totaling 1 hour 40 minutes of total instruction, not including time needed for pausing the videos to practice and ongoing discipline.

Refer to the [Online Course Webpage](#): Individual Work Planning tab to find and download the resources referenced in this guidebook.

## INDIVIDUAL WORK PLANNING

With Boldly & Co.



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**BOLDLY + Co.**

# Lesson 1: Introduction

**Video Length:** 7:09 minutes

**Description:** Overview of the external instructor, their system, and methods for work planning.

- Who is Boldly & Co.?
  - A Wisconsin based productivity consultant contracted by the City of Madison to teach agency level and individual level work planning methods
- What is the Boldly system?
  - A work planning system and methodology for productivity planning that leads with well-being first

# Lesson 2: Defining Productivity

**Video Length:** 6:52 minutes

**Description:** Instructor helps staff understand the definition of the components of productivity.

- Staff are asked to self-define:
  - How do you define productivity?
  - What do you struggle with most about productivity?
  - What does ideal productivity look like for your team/agency?
- 4 components of productivity:
  - Know where you're going
  - Work on the right things in the right ways
  - Communication is productive
  - You are health and whole
- [Well-being wheel](#) is introduced and encouraged as the framework for beginning planning.



<b>Your Staff Were Asked To...</b>	<i>Self-define productivity, what you struggle most with about productivity, and what productivity looks like ideally for your team/agency.</i>
<b>Actions:</b>	<input type="checkbox"/> Supervisors ask your staff how they defined productivity, what they struggle most with about productivity, and what productivity looks like ideally for your team/agency.

# Lesson 3: The Reality and the Results

**Video Length:** 3:45 minutes

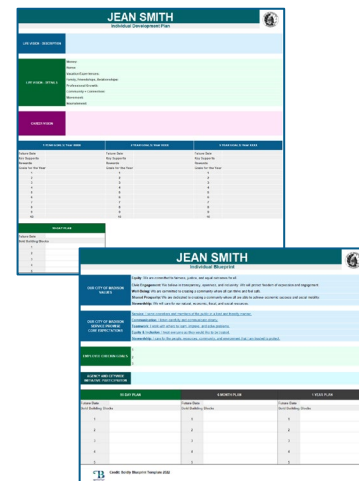
**Description:** Instructor covers the research on planning, productivity, engagement, balance, and likelihood to stay with an organization.

# Lesson 4: Blueprint

**Video Length:** 8:53 minutes

**Description:** Instructor introduces the first component of work planning – the blueprint – to know where you are going.

- Ideally, the individual work plan cascades down from an organizational (City of Madison), agency (Department/Division), and/or unit level work plan blueprint. Personal blueprint borrows from the department/agency blueprint and the organization blueprint.
- Two versions of the blueprint exist:
  - Individual Development Plan: a life and personalized version of a development plan
  - Individual Blueprint: a development plan focused on City of Madison work planning



<b>Your Staff Were Asked To...</b>	Complete the blueprint.
<b>Actions:</b>	<input type="checkbox"/> Ask staff to review and discuss the blueprint they filled out.

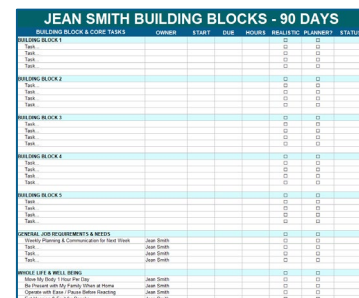
# Lesson 5: Building Blocks

**Video Length:** 13:23 minutes

**Description:** Instructor reviews the building blocks template for planning project tasks associated with the blueprint created with Lesson 4.

- Key steps to planning discussed in this lesson:
  - Document all steps you believe you must take to achieve each milestone.
  - Reflect: does your personal plan include tactical steps for your whole life (not just work)?
  - Review those steps with a partner. Consider:
    - Is it priority or urgent?
    - Are any steps missing?
    - Is partnership needed with someone to complete the task?
    - Can and/or should you delegate the task?
  - Add in start/due dates to your plan. Consider:
    - Are these dates real or arbitrary?
    - Does your plan appear practical?

Does a day ever go perfectly? How can you apply this knowledge to your tasks/steps or dates?
  - Which tasks are you concerned about achieving, or achieving on time?



<b>Your Staff Were Asked To...</b>	Complete the steps discussed in this lesson (also listed above). List 90-day building blocks for the projects you listed in your blueprint.
<b>Actions:</b>	<input type="checkbox"/> Ask your staff to review and discuss the building blocks they created for their 90-day plan. Consider asking how staff processed to the above questions they were asked to reflect on in this lesson, such as: <ul style="list-style-type: none"> <li><input type="checkbox"/> Did you review your draft building blocks with a partner? If so, who did you discuss that with?</li> </ul>

# Lesson 6: Weekly Planning Methodology Overview

**Video Length:** 7:06 minutes

**Description:** Instructor introduces the five steps associated with the work planning methodology. Each step is covered independently in the following videos.

- The five steps to the planning methodology include:
  - Step 1: Cross off time where you have meetings and commitments
  - Step 2: Calculate available time
  - Step 3: Brain dump of all action items (career and whole life)
  - Step 4: Categorize
  - Step 5: Document in planner

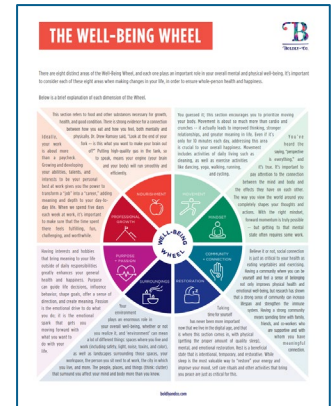
<b>Your Staff Were Asked To...</b>	Get to know the five steps of the planning methodology.
<b>Actions:</b>	<input type="checkbox"/> Get to know the five steps of the planning methodology listed above so you can support your staff.

# Lesson 7: Weekly Planning Step 1

**Video Length:** 4:36 minutes

**Description:** Instructor reviews how to cross off time where you have meetings and commitments.

- Productive planning includes analyzing your day for where you will have time to complete work. This includes analyzing where you need to make time for personal commitments in alignment with the [well-being wheel](#).



<b>Your Staff Were Asked To...</b>	Practice crossing off time where you have meetings and commitments in the coming week as instructed.
<b>Actions:</b>	<input type="checkbox"/> Check in with staff with how well they are translating the lesson into action. Ask questions such as: <ul style="list-style-type: none"> <li><input type="checkbox"/> How do you feel about the lesson for Step 1 in the planning methodology (crossing off tasks)? How did practicing this step feel?</li> <li><input type="checkbox"/> Did you remember to cross reference the well-being wheel?</li> </ul>

## Lesson 8: Weekly Planning Step 2

**Video Length:** 8:11 minutes

**Description:** Instructor reviews how to calculate available time for getting things done.

- This step builds off the previous step.
- Add how many hours you have available for action items.
- Then, plan for approximately 75% of time you believe is available .
  - This number may vary depending on your position in the organization the work you do in order to account for unplanned interruptions, emergent issues that need to be addressed immediately, etc.

<b>Your Staff Were Asked To...</b>	<i>Practice calculating available time for getting things done in the coming week as instructed.</i>
<b>Actions:</b>	<input type="checkbox"/> Check in with staff with how well they are translating the lesson into action. Ask questions such as: <ul style="list-style-type: none"><li><input type="checkbox"/> How do you feel about the lesson for Step 2 in the planning methodology (calculating available time for getting things done)? How did practicing this step feel?</li><li><input type="checkbox"/> Is 75% of time available a reasonable number for you to assume with the work you do?</li><li><input type="checkbox"/> Did you remember to cross reference the <a href="#">well-being wheel</a>?</li></ul>

## Lesson 9: Weekly Planning Step 3

**Video Length:** 4:56 minutes

**Description:** Instructor reviews how to brain dump all action items (career and whole life).

- This step builds off the previous steps (Lessons 7-8).
- Create a list of everything you need to achieve in a given week.
  - Define your priorities for the week.
  - Then, document everything else you can possibly think of that needs to be completed that particular week.
  - If you think the action is required in future weeks, document in that particular week's brain dump section.

<b>Your Staff Were Asked To...</b>	<i>Practice brain dumping all action items for the coming week as instructed.</i>
<b>Actions:</b>	<input type="checkbox"/> Check in with staff with how well they are translating the lesson into action. Consider asking question such as: <ul style="list-style-type: none"><li><input type="checkbox"/> How do you feel about the lesson for Step 3 in the planning methodology (brain dumping all action items)? How did practicing this step feel?</li><li><input type="checkbox"/> Did you remember to cross reference the well-being wheel?</li></ul>

## Lesson 10: Weekly Planning Step 4

**Video Length:** 4:04 minutes

**Description:** Instructor reviews how to categorize your tasks in your blueprint.

- This step builds off the previous steps (Lessons 7-9).
- Not every task has the same weight. Use the following categories:
  - Urgent
  - Everything Else
  - Delegate
  - Priority (taught in Lesson 5)
- Then, consider estimating by when you think you will need to complete the task.

<b>Your Staff Were Asked To...</b>	<i>Practice categorizing the tasks in your blueprint as instructed.</i>
<b>Actions:</b>	<input type="checkbox"/> Check in with staff with how well they are translating the lesson into action. Consider asking questions such as: <ul style="list-style-type: none"><li><input type="checkbox"/> How do you feel about the lesson for Step 4 in the planning methodology (categorizing your tasks)? How did practicing this step feel?</li><li><input type="checkbox"/> Did you remember to cross reference the well-being wheel?</li></ul>

## Lesson 11: Weekly Planning Step 5

**Video Length:** 18:17 minutes

**Description:** Instructor reviews documentation, in your calendar and/or planner, knowing your productivity zones, and communicating your plan for accountability.

- This step builds off the previous steps (Lessons 7-10).
- Method for documentation in your calendar/planner:
  - First, action items.
  - Second, urgent items.
  - Third, everything else and delegate.
- Know your zones and what time of day you are most productive:
  - Green Zone – when you are focused, productive, efficient
  - Yellow Zone – slightly distracted, less creative, less efficient
  - Red Zone – unable to concentrate, not created, very inefficient
- Results of your plan should be communicated with those to whom you are accountable.

<b>Your Staff Were Asked To...</b>	<i>Practice planning for one week at a time as instructed.</i>
<b>Actions:</b>	<input type="checkbox"/> Check in with staff with how well they are translating the lesson into action. Consider asking questions such as: <ul style="list-style-type: none"><li><input type="checkbox"/> How do you feel about the lesson for Step 5 in the planning methodology (documentation in your calendar/planner)? How did practicing this step feel?</li><li><input type="checkbox"/> Did you remember to cross reference the well-being wheel?</li></ul>

# Lesson 12: Weekly Planning Practice

**Video Length:** 10:23 minutes

**Description:** Instructor reviews how to use the brain dump (Lesson 9) to practice the planning methodology. **Do NOT skip this step.**



- Work through the brain dump and pause along the way.
- Reflection questions asked:
  - Did you include the tasks from your building blocks plan?
  - Did you include tasks that focus on your well-being?
  - Did you include a task for planning out your next week?
  - What are your total number of hours for action & tasks vs. available hours?
  - What should you do if your quantity of hours is negative?
  - Which tasks can or should go away? Which get rescheduled?
    - Recommendation: **do NOT remove tasks related to well-being**
  - Should anything on your list become a meeting or commitment on your calendar?

<b>Your Staff Were Asked To...</b>	<i>Practice the work planning methodology. Then reflect on the questions asked.</i>
<b>Actions:</b>	<input type="checkbox"/> Check in with staff with how well they are translating the lesson into action. Consider asking questions such as: <ul style="list-style-type: none"> <li><input type="checkbox"/> How is your work planning practice going?</li> <li><input type="checkbox"/> Where and how are you documenting?</li> <li><input type="checkbox"/> Which day of the week do you plan for the next week ahead?</li> <li><input type="checkbox"/> How are you focusing on tasks related to your well-being?</li> </ul>

# Lesson 13: Conclusion and Next Steps

**Video Length:** 2:26 minutes

**Description:** Instructor reviews the action items coming out of this training series.

- Reminder to return to the personal blueprint and building blocks and complete them.

<b>Your Staff Were Asked To...</b>	<i>Complete the personal blueprint and building blocks if you have not done so by this point in time.</i>
<b>Actions:</b>	<input type="checkbox"/> Continue checking in with staff on with how well they are translating the lesson into action. Consider asking the questions from Lesson 12 ongoing: <ul style="list-style-type: none"> <li><input type="checkbox"/> How is your work planning practice going?</li> <li><input type="checkbox"/> Where and how are you documenting?</li> <li><input type="checkbox"/> Which day of the week do you plan for the next week ahead?</li> <li><input type="checkbox"/> How are you focusing on tasks related to your well-being?</li> </ul>