

# MONTHLY PLANNING CHECKLIST

THE OLDEN CHAPTERS MODIFIED GTD CHECKLIST

## Review Last Month

- Note important events and dates
- Check off all completed tasks: daily, weekly, monthly
- Review all routines, what worked and what didn't?
- Evaluate Budget: add up all expenses, add to spreadsheet
- Evaluate Goals: did you reach all of your goals? Need to migrate any?
- Complete Month Overview: Fill out monthly dashboard

## Capture

- Complete full braindump from trigger list mindmaps
- Collect and process from bullet lists, phone, and notes
- Migrate all unfinished tasks from personal, work, and project lists
- Migrate any unfinished or updated goals

## Prepare

- Refine and edit all routines lists
- Print out new routines lists: Morning, Night, Daily, Weekly
- Add any important dates to calendar from phone and notes
- Prep new budget amounts and budget pages for planner

## Goal Setting

- Create Monthly Mood Boards: Binder Covers, Phone + Computer Background
- Evaluate and create new monthly goals and rewards
- Create monthly goal printout for desk
- Check in with yearly goals
- Create and check in with business goals: last month, year check in, this month
- Fill out timecards and evaluate time management from month

## Project Plan

- Check off all completed tasks for each project
- Evaluate and review all project goals
- Decide on priorities for the month
- Schedule out priorities onto project monthly pages
- Any finished projects? Any new ones need to be added?

### **Monthly Plan**

- Migrate and schedule all unfinished tasks from last month
- Add all events to monthly pages
- Complete quarterly planning lists if Jan, Apr, Jul, or Oct

### **Quarterly Planning**

- Review your bucket list
- Review/Update Yearly Goals and Vision Board
- Create and Review Quarterly Goals
- Create new weekly schedule
- Create and update daily routines
- Review and evaluate all projects from new and updated goals

### **Plan Next Week**

- Check monthly pages for this week's events
- Check project pages for the next two week's deadlines
- Create weekly goals from monthly goals
- Add weekly tasks to pages
- Add monthly and migrated tasks
- Schedule all project, business, school, and personal tasks
- Schedule TV Shows