

Hello and welcome to the online seminar on Planning for Success. My name is Isabel Villasana, and in this short session, we will explore the steps to take to ensure we are successful in whatever it is we may want to accomplish. Success is something that many of us strive to achieve, and we hope that you leave this session with the tools and knowledge to start your own plan for success.

Let's take a look at some of our objectives for today's online seminar. First, we will look at why preparing and planning is critical in our path to success and what we can do to get started with the process. Then we will discuss how we can develop a strategy for success. Lastly, we will go over some tips for staying more organized so that we don't become overwhelmed.

So, let's consider. Take a moment to describe your own organizational skills. Would you describe yourself as very organized with a clear idea or plan? Are you reasonably organized, meaning you have somewhat of an idea or plan but could use some help? Are you not very organized and in need of help coming up with a plan? Or are you not organized at all with no clear idea of what to start with or even how to get started with a plan?

Now, let's think about two questions. First, how does your answer to the previous question affect your stress level? When you think about how organized or how unorganized you are does it leave you feeling content, or are you stressed out? Does your lack of organization lead to stressful thoughts or feelings? Or are you organized and ready to go? Next, why is planning so critical for preventing overwhelm? How do you think planning could help combat the overwhelming feeling you get when thinking about bring successful?

Now, we will go over the rules for planning and organizing.

Rule number one is prioritizing.

Even though you can't do everything at once, prioritizing helps you to figure out which tasks are the most important and which tasks can wait. If you know how to prioritize, you'll be able to break up your work into smaller pieces. Then, you can focus on each task one at a time, starting with the most important.

Do you have a million things to do? Create a list of everything you have to do. Then arrange the list in order of most important. Start tackling the things on your list in the order that you created.

Rule number two is time management.

There is no way to increase the time you have, but you can find ways to better use your time. Time management is making sure your actions help you finish the things you have to do. As you get better at managing your time, it will feel like you have more time.

A time management trick goes hand-in-hand with your list of priorities. With your list of priorities, add time estimates for each task on your list.

Say, replying to emails takes about 20 minutes. You can have a meeting with a coworker for 60 minutes. Something simple like picking up toothpaste, give it 20 minutes.

Do your time estimates add up for way more time than you actually have? Then re-prioritize. What can be moved or shrunk? Being as honest as possible will help you plan a more successful day.

Rule number three is coordinating resources.

Every project and assignment requires the use of some type of resource. A resource is something you need to complete a task. When most people think about resources, they think about money. But resources don't always have to be in the form of money. Sometimes a project will require human resources, or workers. Other projects might require the resources of space or time. Larger projects may require many different kinds of resources.

When working on a project or task, break the project into different, smaller sections. What resources do you need? Consider people or materials you need to complete the project. Again, be honest. Do you need to find a freelance graphic designer to help create content? Use your resources to create the best product or strategy.

Rule number four is delegating.

This can be the most tricky rule. Delegating is a common and an essential practice in the workplace. When you delegate, you give some of your work to other people. Those people are then in charge of getting that work done. Delegating simply means that you have found the best way possible to spread out the work.

Back to the previous example. In your meeting, did the team decide to find a freelance graphic designer to create new marketing materials? Delegate that task to another member on your team. Delegating can be very difficult, but trust your team. If things don't go well, evaluate and learn from the example.

Rule number five: creating systems.

When a machine is working correctly, the work gets done automatically. The machine repeats a process over and over again, with very few errors or mistakes. Although humans aren't machines, we can create systems or processes that can help us to work as well as a machine.

Do you perform the same tasks? Take the time to write down your system of how you do it—a checklist. After you create your checklist, now you have a guide in case you haven't done the task in a while and now you have the process to delegate to someone else.

Rule number six: planning ahead.

Being a successful planner and organizer has a lot to do with your ability to plan ahead. Usually, the more time you have to plan something, the more successful you will be. Sometimes, you have no control over the amount of time you have to complete a project. An unexpected project might come up, and your manager will ask you to take care of it. In these cases, all you can do is make the best use of the time you have.

With the exception of these unexpected projects, try to plan ahead as much as possible at work. When you plan ahead, these unexpected projects will be much more manageable.

Plan out major projects as best as you can. Do you create a quarterly report? Plan ahead to make sure you have everything you need to complete the report in advance.

So, now let's talk about a plan to succeed.

Number one: write things down.

We all know someone that remembers every birthday and sends cards for every holiday. It's not magic, and they don't use memorization. Trying to remember things will not help you to stay organized. You should try writing things down instead.

A pen and some paper is our way of remembering things externally, and it's much more permanent.

You will only further complicate your life by trying to contain important dates and reminders in your head. Write down everything: shopping lists for groceries, holiday gifts, home decor, and important dates like meetings and birthdays.

As an experiment, try writing down people's names shortly after you meet them (when they're not looking, of course), and I'll bet you'll remember a lot more names that way.

Number two: make schedules and deadlines.

Organized people don't waste time. They recognize that keeping things organized goes hand-in-hand with staying productive. They make and keep schedules for the day and week. They make deadlines and set goals. And, most importantly, they stick to them.

Similarly, by living a cluttered lifestyle, you will not have the time or space to make your deadlines or achieve your goals.

As an experiment, look at your bucket list, or make one. Write down the things you want to achieve this year or in your life. Then write down what you need to do to achieve them.

Life is short, so make sure you're doing what matters to you most. If you need a little help on that, here's a wonderful guide: [The Ultimate Guide to Prioritizing Your Work and Life](#).

Number three: don't procrastinate.

Easier said than done. The longer you wait to do something, the more difficult it will be to get it done. If you want your life to be less stressful and less demanding, then organize as soon as you can. Putting in the effort to get things done as soon as possible will lift the weight off of you from doing it later.

As an experiment, think of one thing that you should organize in your life. Write it down. Then write down when you can do it and what you need to get it done. If you can get it done right now, then go do it.

If you want more tips to stop procrastination, check out this guide: [Procrastination—A Step-By-Step Guide to Stop Procrastinating](#).

Number four: give everything a home.

It's easy to get lost if you don't have a home. Keeping your life organized means keeping your things in their proper place. Organized people keep order by storing things properly and labeling storage spaces.

Make easy-to-access storage spaces for things you use all the time, and don't let your storage spaces get cluttered. Be creative about finding places for things. In addition, as a big no, never label a storage space as "miscellaneous."

As an experiment, choose one place in your home that you can reorganize. If there are scattered items, then group them together. Once you've sorted everything, find or make a home for similar items, label the homes, and put them in the proper places.

For example, a cup holder for your pens and pencils should go in an easily accessible place, but the rarely used craft materials can be stored out of sight.

Number five: declutter regularly.

Find time each week to organize. Highly organized people make sure they find time every week or more to organize their things. Stuff does not stay organized on its own; it needs to be reorganized continuously and consistently.

Number six: keep only what you need.

More stuff means more clutter. People who live organized lives only keep what they need and what they really, really want. Having fewer things also means that you enjoy those things more and feel better about using everything you own, rather than letting half of what you own collect dust.

Have you ever felt like you don't have the space to keep all the stuff you own? Instead of renting a storage unit or buying a larger home, get rid of some things.

As an experiment, write down the number of things you think you actually need. Then, write a list of all the things that you own. If the number of things you actually own exceeds your ideal need list, then it's time to organize.

Number seven: know where to discard items.

Do whatever you can to get rid of stuff. Less stuff means less clutter.

Donate to charity shops. Sell on Craigslist or eBay. Take a trip to the recycling center. Set up a garage sale. Find a place to get rid of your things.

As an experiment, choose one space in your house to purge. Go through shelves, drawers, and boxes. Everything you find that you don't need, set aside. Make a pile of things to maybe keep, which you can go through later, and a pile of things to discard now. Then find a way to kick those things out the door immediately.

Number eight: stay away from bargains.

Instead of bargain shopping without planning ahead, write down exactly what you need to buy, and buy only those items. Organized people do not give in to false advertising. Items on sale will only produce more clutter.

As an experiment, go to a shopping mall with no money. Just look at all the things on sale that you wish you could buy if you had brought your wallet or purse.

If you find nothing, then good for you. If you made a list, then keep that list somewhere, and look at it a month from now. If you still want it, then it's safe to buy.

Number nine: delegate responsibilities.

A really organized life is not overfilled with responsibilities, meetings, and deadlines. In fact, it has less because things that create stress have been slowly organized out.

As an experiment, look at your to-do list or make one. Go through the list and find one task that you can remove from your list or give to someone else. Now feel the stress of having to do it fall away.

Number 10: work hard.

Put in a little effort. Actually, put in a lot of effort when necessary.

Once you have delegated responsibilities and made a schedule, then you can organize what you have to do and when you can do it.

Staying organized is not all a breeze. It requires that you work hard with recognition that when you work harder, you can enjoy your clutter-free home life later.

Work harder when you feel like giving up today.

So, now that we have a plan to succeed and have learned some tools to use along the way, let's ask ourselves one last question: what will you do to become more organized? Look back on the skills that we have gone over today, and start working on your plan.

Thank you for joining us today for this online seminar on Planning for Success. I hope you took something, or maybe many things, from this session, and please don't hesitate to reach out and ask any questions that you may have. Thank you again for listening, and I hope you enjoy the rest of your day!