



# Syllabus

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**WATCH THE ORIENTATION REPLAY AT [ORGANIZE365.COM/ORIENTATION](https://organize365.com/orientation)**

**PURPOSE OF THE  
FRIDAY WORKBOX®  
PLANNING DAY:**

As Dale Carnegie said, "An hour of planning can save 10 hours of doing."

Time is going to pass. Productive, purposeful people know that planning is the difference between working on your plans and someone else imposing their plans on you. Have you ever found yourself saying or thinking:

- "There just isn't enough time."
- "You can't do it all."
- "There is no such thing as work/life balance."

Organization is where time comes from. The Friday Workbox® Planning Day will allow you to unlock decades of productivity. Living a reactive life can go on indefinitely. Put that in your rearview mirror. Moving to a purposeful, positive, and productive life is a lifelong pursuit that takes dedication and discipline. The Friday Workbox® Planning Day will teach you the habits and strategies to make the most of your time, set and achieve your goals, and create a more proactive work environment for yourself and your team.

Friday Workbox® Planning Day is time with Lisa and your Friday Workbox® Planner that will level up your work productivity with tangible results. Lisa's gift of educating others on how to PLAN is the business coaching you need. Lisa combines her 20 years of experience as CEO, best selling author, podcaster, and entrepreneur with proven results to help you grow your business, enhance your leadership, and uplevel your work contributions. Let's move from reactive to productive. During Planning Day, you will learn how to best organize your workflows and establish routines that will grow your productivity muscles.

**OBJECTIVES:**

- Learn how to prioritize your work responsibilities, projects, and tasks
- Create a system for managing your time and tasks
- Problem solve and proactively determine your "next steps"
- Eliminate decision fatigue at work
- Seamlessly move from project to project without your core job responsibilities getting lost in the process

- Organize your communication and delegation to your team
- Streamline goal planning and complete goals in less time with more focused effort and less disorganization and distractions
- Implement functional organization that actually works
- All of your work is important, but it is not all equal, and some of your work may not even be accounted for. The Friday Workbox® makes the invisible work visible.
- Establish attainable goals and timelines for your work projects

#### **SUPPLIES:**

- ☐ [Business Friday Workbox®](#)
- ☐ [Friday Workbox® Goal Planner](#)
- ☐ [Friday Workbox® Planning Day](#)
- ☐ [Portable Sunday Basket®](#) - perfect for weekly slash pockets and offsite meetings
- ☐ Extra Slash Pockets
  - ☐ [1.0](#) (Multicolor pack)
  - ☐ [2.0](#) (Additional colors as needed)
- ☐ [Notepads \(small and large\)](#)
- ☐ [Friday Workbox® Podcasts](#)

#### **PLANNING DAY PROCESS:**

##### **Preparation:**

We recommend you do some homework before the live event or watching the replay.

1. Watch or listen to [The Friday Workbox® Orientation](#) replay
2. Clean out your Friday Workbox®
  - Eliminate old projects and slash pockets that held work that is now finished
  - Organize new index or notecards with ideas
  - Re-label slash pockets (You will make some new slash pockets and refinements after Planning Day)
  - Refresh your Friday Workbox® and your mind of the possibilities
3. Review your new planner

##### **On Planning Day, we will:**

1. Review the last quarter
2. Focus on what the next 90 days look like in your role
3. Update your monthly repetitive activities sheets
4. Pink Work Focus
  - a. Brain Dump - get out all the ideas or things that are in your head, so you can be free to think clearly
  - b. This will also include any secret projects or projects that are for you only
5. Purple Work Focus
  - a. For whole team or company
  - b. Limit this to three goals/slash pockets
  - c. Go back later and divide out by 12 weeks
6. Blue Work Focus

- a. Team growth
  - b. Meeting cadence
- 7. Green Work Focus
  - a. Work routines
  - b. What does an ideal week look like for the next 90 days?
  - c. Task Stacking
  - d. Email
  - e. Expense Tracker
- 8. Focus on what the next 90 days look like in your role
- 9. Get ready to RUN your plan!

**TIPS FOR SUCCESS:**

Here are some tips for making the most out of your Friday Workbox® Planning Day with Lisa experience and optimizing your results:

- Go through your Friday Workbox® before Planning Day
- Wait 24 hours before you watch the Planning Day replay
- Avoid trying to memorize the whole Planning Day - implement what you learn a little at a time. Expand on your planning skills with each planning day.
- Sign up for the subscription plan after Planning Day to establish the Planning Day Habit. Planning Day Subscription includes the planners and FREE shipping.
- Do not try to complete the whole Friday Workbox® planner in your first quarter
- Focus on one to two primary roles each cycle - don't try to focus on too many roles!
- Organize new index or notecards with ideas
- Re-label slash pockets to fit your new plan for your new quarter

**OUTCOMES:**

What does a productive work life feel like? Here is how Friday Workbox® clients describe their outcomes:

- I don't feel anxious anymore.
- I feel like I can breathe.
- My brain is able to think again.
- I can have a work idea and still enjoy my off work hours.
- I feel in control
- I am not missing anything anymore
- I am on time and prepared for my life
- Our projects come in early and under budget!
- I make better decisions
- I have more time with my family
- Our team is happier!

**NEXT STEPS IN ORGANIZATIONAL JOURNEY:**

The more Organize 365® solutions you use, the more time and organizational success you acquire. Organize 365® customers typically implement all the solutions over a period of 6-18 months. This allows them to make the invisible work visible, get organized, experience less daily frustration and spend more time doing the things they are uniquely created to do.

- **[The Sunday Basket®](#)**
  - Eliminate paper piles & to do list
  - Learn the foundational skills of organization
  - Build routines for paperwork, phone calls, paying bills and planning out your week
  - Save 5 or more hours each week
  - [Listen to The Sunday Basket® Podcast Playlist](#)
- **[The Friday Workbox®](#)**
  - We offer two selections - a [Business Friday Workbox®](#) (for all careers other than teaching/educators) and [Education Friday Workbox®](#)(for teachers and educators)
  - The Friday Workbox® will provide you with a proven solution and teach you habits similar to those of The Sunday Basket®, but for your work.
  - [Listen to The Friday Workbox® Podcasts](#)

#### **ADDITIONAL RESOURCES:**

- [Visit our webpage dedicated to the Business Friday Workbox®](#)
- [Sign-up for Friday Workbox® Planning Day](#)
- Listen to the [Friday Workbox® Podcast Playlist](#) Podcast
- Work with a [Certified Organizer](#) to customize your Friday Workbox®
- Attend a follow up [Friday Workbox® Planning Retreat](#) with a [Certified Organizer](#) to complete the Planning Day tasks

