A QUICK CHECKLIST TO SET UP YOUR PLANNING SYSTEM

PLANNING SYSTEM SETUP

Checklist

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What You'll LEARN

01 How to set up an inbox system to capture all your to-dos and ideas.

02 The four essential components of any planning system: inbox, tasks, calendar, and notes.

03 How to establish routines that make it easy to check and update your planner regularly.

04 Tips for syncing paper and digital tools in a way that actually works.

05 Proven strategies to avoid planning burnout and make this process fun.

My STORY

Hi there,

I'm Wenda, a mom of three, content creator, and lifelong lover of planning. My journey into planning didn't start with perfectly color-coded tabs or an Instagram-worthy planner spread. It began out of pure necessity—juggling motherhood, running a business, and trying to keep my sanity intact. Sound familiar?

Over the years, I've tried all the planning systems—paper planners, digital tools, hybrid setups—you name it. Each one taught me something new, but none of them were quite "the one" until I realized something: a planning system isn't a one-size-fits-all solution. It's about creating a process that fits your life, your brain, and your goals. That's when everything clicked.

This guide isn't just about setting up a planner. It's about building a system that:

- Reduces overwhelm so you can focus on what matters.
- Helps you feel in control, even on the busiest days.
- Actually works for you, not against you.

planning is personal.

Planning System CHECKLIST

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Step 1: Define Your Planning Needs

Decide what you want your planner to accomplish (e.g., manage daily tasks, long-term goals, projects, appointments, or all of the above).

Tools: Choose between paper, digital, or hybrid systems.

- Paper: A5 planner, spiral notebook, etc.
- Digital: ClickUp, Notion, Google Calendar, etc.
- Hybrid: Paper planner for tasks + digital tools for reference or appointments.

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Step 2: Set Up Your Core Sections

Your planning system should have these four main sections:

- 1. Inbox
  - A catch-all space for everything: ideas, tasks, and to-dos as they pop into your head.
  - Examples:
    - Paper: Dedicated blank pages or a tab.
    - Digital: A “quick capture” task list in ClickUp or Notion.
- 2. Tasks
  - A prioritized list of actionable items.
  - Divide tasks into daily, weekly, and monthly categories.
  - Example:
    - Use a simple system like ABC (A=Urgent, B=Important, C=Optional).
- 3. Calendar
  - Tracks appointments, deadlines, and events.
  - Includes yearly, monthly, and weekly overviews.
  - Sync paper and digital calendars for seamless access.
- 4. Notes
  - A space for reference information, ideas, and brainstorming.
  - Include categories for projects, recurring info (e.g., contacts, routines), or inspiration.

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Step 3: Customize Your Planning System

- Add dividers or tabs for easy navigation (physical or digital).
- Choose color coding or symbols to categorize tasks and events.
- Create templates for recurring tasks, such as meeting agendas or shopping lists.
- Sync digital tools with apps like Google Calendar for on-the-go updates.
- Enhance your system with these optional sections:
  - Goals: Track yearly, quarterly, and monthly goals, breaking them into actionable steps.
  - Routines & Habits: Use trackers for daily, weekly, and monthly routines (e.g., morning habits, workouts, cleaning).
  - Projects: Plan and track big ideas or work projects with dedicated pages or folders.

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Step 4: Establish Routines for Checking Your Planner

- 1. Daily Routine (5-10 minutes)
  - Morning:
    - Review today's schedule and top priorities.
    - Add new tasks or notes.
  - Evening:
    - Check off completed tasks.
    - Reflect on wins and plan for the next day.
- 2. Weekly Routine (30-60 minutes)
  - Weekly Reset (e.g., Sunday or Friday):
    - Review the past week.
    - Plan the next week's schedule, priorities, and tasks.
    - Add recurring tasks, such as bill payments or meal plans.
- 3. Monthly Routine (60-90 minutes)
  - End-of-Month Review:
    - Reflect on progress toward monthly goals.
    - Migrate incomplete tasks to the next month.
    - Set up your calendar and key goals for the upcoming month.
- 4. Quarterly Routine (90-120 minutes)
  - Evaluate long-term goals.
  - Adjust strategies or systems as needed.
  - Plan out the next 3 months with focus areas.

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Step 5: Maintenance & Decluttering

- Weekly Declutter:
  - Remove irrelevant tasks and notes.
  - Archive completed items.
- Quarterly Reset:
  - Assess what's working and what's not.
  - Update templates, routines, or tools as needed.

Want a step-by-step guide to setting up your perfect planner system?

I created a full workbook that walks you through it, complete with prompts, templates, and setup guidance to help you create a system that actually works for your life.

Whether you use a digital planner, juggle multiple paper planners, or stick with a simple pre-printed one, this workbook adapts to you.

👉 Grab the Perfect Planner Setup Workbook at a limited-time discount here:
Get it now before it's gone

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